

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars
Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA

Monday, April 03, 2023, 6:30 pm
25 Newton Road, Woodbridge, CT

- 1. CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. APPROVAL OF MINUTES**
 - a. Board of Education Special Meeting – March 09, 2023 page 4
 - b. Board of Education Regular Meeting – March 13, 2023 page 5
- 4. STUDENT REPORT**
 - a. Monthly Report
- 5. PUBLIC COMMENT**
- 6. SUPERINTENDENT’S REPORT**
 - a. Personnel Report page 11
 - b. Superintendent Report page 12
- 7. CORRESPONDENCE**
- 8. CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. ACES
 2. CABE
 3. Communications
 4. Curriculum
 5. District Health and Safety
 6. Diversity, Equity, and Inclusion Executive Committee
 7. District Technology
 - a. Monthly Report page 15
 8. Facilities
 - a. Monthly Report page 16
 9. Finance
 - a. Discussion of Monthly Financial Statements page 17
 - b. Director of Finance and Administration Approved Transfers Under \$3,000 page 50
 - c. Discussion and Possible Action on Budget Transfers over \$3,000 page 53
 - d. Discussion and Possible Action on Capital Projects Change Orders page 55

PLEASE POST

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10. Policy
 - a. First Read
 1. Policy 6144 Controversial Topics page 56
 2. Policy 0524 Bias Incidents in Schools page 61
 - b. Discussion and Possible Action on Second Read Policies
 1. Policy 6161 Materials Selection and Deselection Policy page 65
11. Personnel

9. **NEW BUSINESS**

10. **ITEMS FOR THE NEXT AGENDA – Due to Chairperson by April 30, 2023**

11. **ADJOURNMENT**



Jennifer P. Byars, Ed.D.
Superintendent of Schools

pc: Town Clerks Bethany, Orange, Woodbridge

***Working to "enable every Amity student to become a lifelong learner
and a literate, caring, creative and effective world citizen."***
District Mission Statement

If you require accommodations to participate because of a disability,
please contact the office of the Superintendent of Schools in advance at 203-397-4811.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
BOARD OF EDUCATION
Bethany Orange Woodbridge



NORMS

BE RESPECTFUL

- Model civil discourse and discussion, respecting all viewpoints, welcoming ideas, and disagreeing with courtesy.
- Collaborate as a team.
- Listen actively and refrain from interruptions or side conversations.
- Respect each others' time by brevity of comment.
- Be fully present and mindful of the distractions caused by electronic devices.
- Grow and learn from each other.

HONOR THE POSITION

- Work within the Board's statutory and policy duties.
- Prepare for Board & Committee meetings by reading the packet prior to the meeting.
- Treat each student, parent, and stakeholder respectfully and assist them in following the designated chain of command.
- Be reflective, including conducting an annual Board self-evaluation.

REPRESENT THE BOARD WITH UNITY AND PRIDE

- Make decisions based on what is best for the collective student body of Amity Regional School District No. 5.
- Respect the professional expertise of the staff.
- Be flexible in response to challenges.
- Collaboratively engage in discussions and actions and once voted on, provide undivided support of Board decisions in both public and private.

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars
Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING AGENDA

Thursday, March 09, 2023, 6:00 pm
25 Newton Road, Woodbridge, CT

BOARD MEMBERS PRESENT

Shannan Carlson, Paul Davis, Sean Hartshorn, Andrea Hubbard, Christina Levere-D'Addio (arrived 6:05 p.m.), Dr. Carol Oladele, , Donna Schuster, Dr. K. Sudhir (arrived 6:03 p.m.), Amy Tirollo

BOARD MEMBERS ABSENT

Christopher Browe, Carla Eichler, Patrick Reed, Dr. Jennifer Turner

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:00 p.m.

2. APPROVAL OF MINUTES

a. Regular Board of Education Meeting – February 13, 2023

MOTION by Amy Tirollo, *SECOND* by Sean Hartshorn, *to approve minutes as submitted*
VOTES IN FAVOR, 7 (Davis, Hartshorn, Hubbard, Dr. Oladele, Schuster, Dr. Sudhir, Tirollo)
ABSTAINED, 1 (Carlson)
NOT PRESENT FOR VOTE 1 (Levere-D'Addio)
MOTION CARRIED

3. DISCUSSION AND POSSIBLE ACTION ON SUPERINTENDENT'S MID-YEAR EVALUATION (EXECUTIVE SESSION)

Executive Session entered at 6:04 p.m.

Exit Executive Session 7:16 p.m.

MOTION by Shannon Carlson, *SECOND* by Sean Hartshorn *to exit Executive Session*

MOTION by Donna Schuster, *SECOND* by Shannon Carlson, *to approve Superintendent's Mid- Year Evaluation*
VOTES IN FAVOR, 9 (UNANIMOUS)
MOTION CARRIED

4. ADJOURNMENT

MOTION by Sean Hartshorn, *SECOND* by Donna Schuster *to adjourn*

VOTES IN FAVOR, 9 (UNANIMOUS)

MOTION CARRIED

Meeting adjourned at 7:16 p.m.

AMITY REGIONAL SCHOOL DISTRICT NO. 5

*Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525*

*Dr. Jennifer P. Byars
Superintendent of Schools*

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA

**Monday, March 13, 2023, 6:30 pm
25 Newton Road, Woodbridge, CT**

BOARD MEMBERS PRESENT

Christopher Browe, Shannan Carlson, Paul Davis, Carla Eichler , Sean Hartshorn, Andrea Hubbard, Dr. Carol Oladele, Patrick Reed, Donna Schuster, Dr. K. Sudhir, Amy Tirolo, Dr. Jennifer Turner

BOARD MEMBERS ABSENT

Christina Levere-D'Addio

STUDENT BOARD MEMBERS PRESENT

Marin Korenga

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Andre Hauser, Theresa Lumas and Frank Purcaro

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:31 p.m.

2. PLEDGE OF ALLEGIANCE

Recited by those present

3. STUDENT REPORT

- a. Monthly Report

Presented by Marin Korenga

4. RECOGNITION OF NATIONAL MERIT SCHOLARSHIP FINALISTS

Presented by ARHS Pricipal Mr. Hauser

5. PUBLIC COMMENT

AEA President Thanks the board for engaging in good dialogue regarding teacher retention, thanks parent groups organizing signs of support, addressed budget reduction and its ultimate impact on the morale of teachers. Announces that declining enrollment is recovering and enrollment is on the increase, yet now we are considering teacher reduction. Continues on to state that attrition does not make the situation any better and states that “do more with less” should not be the attitude of the board.

Amity Parent begins to address concerns regarding the Amity Varsity Soccer Coach. Mr. Davis interrupts and states board policy against the type of defamatory comments that were about to be made. Mr. Davis reminds the parent that there are proper chains of command to properly readdressing these types of concerns and regardless of the turn out of those measures, it does not allow you to use the public forum to voice those concerns and defame an employee of the district. The parent clarifies that he is not here to defame anyone and that he would stand down and take a seat without further comment.

Bethany parent praises Amity Bethany Middle School for the way they addressed conversations on the relationship between vaccines and autism. Parent continues to address the library book selection policy and states her belief that the policy appears reasonable and agreeable. Parent comments that the form is a challenging, a bit too vague and a bit leading. Parent names and discusses several books and lends her support to the libraries and encourages everyone to “read all the books”

Woodbridge resident addresses the role of DEI in proposed budget, encourages parents to opt out of the survey process, questions the position of DEI in the current budget and the expectation that tax payers pay to support the position and support DEI education.

Orange parent questions the board if anyone has done their due diligence to educate themselves on the ARHS curriculum and suggest that if they had they would acknowledge that there is no denying that CRT and DEI are being taught at the high school. Parent reads a quote by Matt Walsh suggesting that the Board and teachers are child abusers and predators due to the topics we teach.

Woodbridge parent refers to a newspaper article thanking Dr. Sudhir for the pie chart in the paper. Parent addresses talking points from the article from student behavior, too much diversity, too little diversity... Parent goes on to suggest that we get out of the DEI business and get back to do what we are meant to do. Reading Writing and Arithmetic. Parent urges the district to get out of the “social experiment business” that the district has turned into and back to the rigor of academics in the district. Parent requests that the board add the agenda item of “Response from the previous meetings public comment”.

Orange Resident dissects portions of the BOE packet refers to page 18 and net balance, page 20 item 8 OPEB Trust, column 4, page 26 variance \$305,000, page 14 Budget 2.25 % increase line 16 column 5

Orange parent states his commitment to support the staff, teachers, admin, members of the board, volunteers ... continues to extend the invitation to meet to discuss these matters further with members of the community outside the confines of the BOE meeting.

6. SUPERINTENDENT'S REPORT

- a. **Personnel Report**
- b. **Superintendent Report**

Presented by Amity Region 5 Superintendent of School Dr. Jennifer Byars

7. CORRESPONDENCE

Presented by Amity Board of Education Secretary Mr. Sean Hartshorn

8. CHAIRMAN'S REPORT

- a. Committee Reports
 - 1. ACES
 - 2. CABE
 - 3. Communications
 - 4. Curriculum
 - a. Discussion and Possible Action on approval of 8th grade Social Studies textbook, Houghton Mifflin Harcourt's US History: Beginnings to 1877

Presented by Amity Region 5 Assistant Superintendent Frank Purcaro

MOTION by Shannon Carlson, SECOND by, Patrick Reed to approve the 8th grade Social Studies textbook, Houghton Mifflin Harcourt's US History: Beginnings to 1877

VOTES IN FAVOR, 12 (unanimous)

MOTION CARRIED

- 5. District Health and Safety
- 6. Diversity, Equity, and Inclusion Executive Committee
- 7. District Technology
 - a. Monthly Report
- 8. Facilities
 - a. Monthly Report
- 9. Finance
 - a. Discussion and Possible Action on the Superintendent's Proposed 2023-24 Budget

MOTION by Donna Schuster, SECOND by Sean Hartshorn to remove the \$35,000 in funds, for the maintenance of the turf field, from the Superintendent's Proposed 2023-24

VOTES IN FAVOR, 3 (Hartshorn, Oladele, Schuster)

VOTES OPPOSED, 9 (Christopher Browe, Shannan Carlson, Paul Davis, Carla Eichler, Andrea Hubbard, Patrick Reed, Dr. K. Sudhir, Amy Tirolo, Dr. Jennifer Turner)

MOTION FAILS

PLEASE POST

PLEASE POST

MOTION by Amy Tirollo, *SECOND* by Christopher Browe to approve the Superintendent’s Proposed 2023-24 *VOTES IN FAVOR, 11* (Christopher Browe, Shannan Carlson, Paul Davis, Carla Eichler, Andrea Hubbard, Dr. Carol Oladele, Patrick Reed, Donna Schuster, Dr. K. Sudhir, Amy Tirollo, Dr. Jennifer Turner) *VOTES OPPOSED, 1* (Sean Hartshorn) *MOTION CARRIES*

b. Discussion of Monthly Financial Statements

Presented by Amity Region 5 Director of Finance Theresa Lumas

c. Director of Finance and Administration Approved Transfers Under \$3,000

Presented by Amity Region 5 Director of Finance Theresa Lumas

d. Discussion and Possible Action on Budget Transfers over \$3,000

1. **Textbook: World Language and Science**
2. **ARHS Student Competition: Academic Decathlon Team**
3. **Special Education: Contracted Services**

MOTION by Christopher Browe, *SECOND* by Sean Hartshorn, to Approve the following budget transfer in the textbook accounts at the high school:

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-11-1009-5641	Textbooks-Math	\$16,100	
03-11-1010-5641	Textbooks-Music	\$ 1,293	
03-13-2400-5641	Textbooks-Principal	\$ 3,789	
03-11-1006-5641	Textbooks- World Language		\$14,017
03-11-1013-5641	Textbooks- Science		\$ 7,165

Approve the following budget transfer in Academic Decathlon National Championship entry and travel at the high school:

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-13-2400-5330	Professional Tech Services	\$ 8,000	
03-13-2400-5590	Other Purchased Services		\$ 8,000

PLEASE POST

PLEASE POST

Approve the following budget transfer for contracted services due to vacant positions:

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-12-2150-5111	Certified Salaries	\$ 3,000	
04-12-6110-5560	Tuition Private Out	\$45,000	
04-12-6130-5560	Tuition Private Out	\$ 2,080	
04-12-1203-5330	Professional Technical Svcs	\$10,400	
04-12-2151-5330	Professional Technical Svcs	\$20,000	
04-13-2130-5330	Professional Technical Svcs		\$50,080
04-12-1208-5330	Professional Technical Svcs		\$30,400

VOTES IN FAVOR, 12 (Unanimous)

MOTION CARRIED

- e. Other
 - 1. Grant Report
 - 2. Capital Report

Presented by Amity Region 5 Director of Finance Theresa Lumas

- 10. Policy
 - a. First Read
 - 1. Policy 6161 Materials Selection and Deselection Policy
 - b. Second Read – Discussion and Possible Action on Approval of Policies
 - 1. Policy P5131 Students Conduct and Discipline
 - 2. Policy P5131.7 Students Weapons and Dangerous Instruments
 - 3. Policy P5131.8 Students Out of School Misconduct

MOTION by Sean Hartshorn, SECOND by Shannon Carlson to accept Policy P5131 Students Conduct and Discipline with suggested edits and Policy P5131.7 Students Weapons and Dangerous Instruments and Policy P5131.8 Students Out of School Misconduct as submitted.

VOTES IN FAVOR, 12 (unanimous)

MOTION CARRIED

- 11. Personnel

9. NEW BUSINESS

10. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by March 31, 2023

11. ADJOURNMENT

Meeting was adjourned at 9:07 p.m by Chairman Davis.

Respectfully submitted,

PLEASE POST

Lisa Zaleski

BOE Recording Secretary

PLEASE POST

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

April 3, 2023

To: Members of the Board of Education
From: Jennifer P. Byars, Ed.D., Superintendent of Schools
Re: Personnel Report

NEW HIRES-CERTIFIED:

• Amity Regional High School:

Clare Collins – F/T School Psychologist – Clare completed her practicum at Green Chimney’s School in Brewster, NY and also at Middle Gate Elementary School in Newtown, CT. She also gained high school experience from her internship at Jonathan Law High School in Milford, CT. Clare earned her Bachelor’s Degree with a double major in Psychological Sciences and Human Development & Family Sciences from the University of Connecticut. She earned her Master’s Degree in School Psychology from Fairfield University and is currently pursuing her 6th Year Certificate in School Psychology also from Fairfield University.

• Amity Regional Middle School – Bethany:

Jenna DiLorenzo – F/T School Psychologist – Jenna is a former Amity student. She has completed her practicum at Spring Glen Elementary School in Hamden and completed her internship at Seymour Middle School. Jenna earned her Bachelor’s Degree in School Psychology from University of Bridgeport and her Master’s Degree in School Psychology from Southern CT. State University. She is currently pursuing her 6th Year Certificate also from Southern CT. State University.

• Amity Regional Middle School – Orange: **NONE**

NEW HIRES-BENCH/LONG TERM SUBSTITUTES:

Alexa Giammattei – 4 Day Bench Substitute Teacher – Amity Middle School - Orange

NEW HIRES-NON-CERTIFIED:

Donald Linley – 2nd Shift Custodian – Amity Middle School-Orange
Jeanie Cyr – Paraprofessional – Amity Regional High School-SAILS

NEW HIRES-COACHES:

Christopher Small – Boys Volleyball Coach – 2023 Spring Season – Amity Middle School-Orange

TRANSFERS:

Theresa Biagiarelli – FT Spanish Language Teacher at Amity Regional High School to the position of FT Spanish Language Teacher at Amity Middle School-Orange, effective the 2023-2024 school year.

RESIGNATIONS:

Brian Dower – IT Technician ~ Amity Regional High School, effective 03/31/2023
Melanie Jaramillo – Special Education Teacher ~ Amity Regional High School, effective 4/16/2023

RETIREMENTS: NONE

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

Superintendent's Report – April 2023

Continuously improve instruction, cultivate creativity, and enhance student engagement and performance.

Enhance the efficient and effective use of resources.

Foster a supportive climate for students and adults.

Instruction

School Day SAT: The annual School-Day SAT Testing Day was Wednesday, March 22, 2023. The day featured the SAT test for Grade 11, Pre-ACT test for Grade 10, a series of team-building and awareness activities for Grade 9, and an opportunity for Grade 12 students to work on their preparations for the spring UELP internship program.

CT Science and Engineering Fair Results: Throughout the second half of March, 18 of our Science Research students have been competing virtually in the CT Science and Engineering Fair, the most prestigious science fair in CT. We learned last week that 10 of our 18 Amity students became finalists, which is a near-record high for the school, and that they were awarded more than \$95,000 in scholarships for their innovative work.

AMSO Counseling Lesson – Text Anxiety: In response to a survey given earlier in the year, AMSO school counselors met with 7th and 8th grade students to do a lesson on reducing test anxiety. Students learned how to identify the symptoms of test anxiety along with coping skills and strategies students can implement to ease stress and perform to the best of their ability. Students were encouraged to reach out to the counseling staff with any questions or concerns if they feel they need additional assistance in coping with test anxiety.

Mathematical Puzzle Challenge: On Thursday, March 16, 2023, members of the Amity Math Honor Society (Mu Alpha Theta) and the Amity Math Team participated in the Mathematical Puzzle Programs High School Challenge hosted by Southern Connecticut State University. The team-based competition emphasizes collaboration and communication where students solve problems drawing from design theory, number theory, graph theory, and topology. Amity had three teams of 4-8 students participating and one of the teams (No Limit Gang) secured first place. The student mathletes were chaperoned by Joycelyn Romero (Math Teacher and Faculty Advisor of Math Team & Mu Alpha Theta) and Courtney Morrison (Math Teacher).

AMSB Media Center: Students have been utilizing their Academic Success period by coming down to the Library Media Center and checking out books, working with partners, and enjoying the games and puzzles. They have also been using the Media Center during lunch. AMSB students just completed a Ping Pong tournament during the lunch waves, and several students use the quiet time to choose from our many puzzles and board games. Students can come down any day after they finish their lunch.

AMSO Small Ensemble Concert: Several AMSO students performed in the small ensemble concert on Wednesday, March 22, 2023. Parents and guests were treated to a wide variety of music including rock, classical and pop. Ms. Morace and Mr. Barnes brought these students together to share their diverse talents and their passion for music.

ACES Curriculum Writing Training: English teachers in grades 7-12 met with Dina Secchiaroli from ACES for training on curriculum writing in an Understanding by Design format. Teachers were given time to collaborate on lesson design, practice developing essential questions, and create performance-based assessments. Following the training, teachers will begin revising units and assessment throughout the spring and summer.

BOWA District Meetings: The meeting of the BOWA District Curriculum Directors was hosted by Amity in March, as the inter-district team reviewed the Portrait of the Graduate Learning Progressions. The document will now be shared with the teachers and staff in the BOWA schools for review and feedback. This is an essential step in building vertical articulation and alignment in grades K-12 as we continue to rollout the Portrait of the Graduate.

Professional Development and Evaluation Committee (PDEC): Technology Instructional Coach Lisa Lassen attended the district's PDEC Committee this month to demonstrate how Schoology can be used as the primary platform for Teacher Evaluation in 2023-2024. The group also continued their work on the development of the 2023-2024 professional learning calendar.

Curriculum Articulation Meetings: Science, Visual and Performing Arts, and Math curriculum articulation meetings occurred during the month of March. The agenda topics that were covered included identifying opportunities for targeted professional learning and discussions pertaining to curriculum alignment and pacing.

Resources

Haven's Harvest Food Collection: ARHS students and Science teacher Alison Nork are helping the environment and those in need through their collaboration with the Haven's Harvest food collection program in New Haven. We learned in March that, thanks to their efforts in the past year, Amity kept more than 3,300 pounds of food out of the landfill and got it into the hands of people who need it.

Annual PMT Update: Selected certified staff, paraprofessional, school nurses, and security refreshed their skills in the area of Physical and Psychological Management Techniques (PMT) on March 16, 2023. PMT training is essential to proactively ensure student and staff safety and well-being. It increases understanding about the aspects of the crisis intervention process and increases the range of response options available to individual staff and teams. By using PMT problem solving and critical thinking skills, it helps staff avoid the use of physical restraint techniques.

Administrator Professional Development: District leaders attended the "Innovating Against the Tide" Conference hosted by CAPSS on March 28, 2023. School districts throughout the state were represented at this engaging event. Among the many topics discussed were the use of Open AI and ChatGPT within the classroom, the economics of school budgeting, and strategies for addressing school attendance.

Climate

Spring Athletics: The warmer weather brings out our athletes! The spring athletic season started with 522 student athletes registered for try-outs at ARHS and close to 200 student athletes registered across our two middle schools.

Beauty and the Beast: The big news in the Amity Arts world was the performance of Amity Creative Theater's *Beauty and the Beast*, which staged its two-weekend run of sold-out performances throughout the past two weeks. Beyond what you will see on stage, this production is a schoolwide event that called on the talents of student actors, musicians, stage crew members, and carpenters as well as a team of adult volunteers and advisors to become a reality.

School Climate Survey: The annual school climate survey was administered to students during the last week in March. Surveys were also distributed to staff and families throughout the district. The results will be collected, analyzed, and reported to the Board of Education at a forthcoming meeting.

STEAM Day: Amity High School will be holding its annual STEAM Day event on Wednesday, May 31, 2023. All Bethany, Orange, and Woodbridge fifth grade students are invited to attend this wonderful day and actively engage in Science, Technology, Engineering, the Arts, and Mathematics activities.

Digital Media Meets ATA: Students in the Amity Transition Academy-UNH Orange Campus celebrated International Down Syndrome Day on March 21, 2023. Students from ATA-UNH Orange joined students from the Digital Media class at AMSB to exchange gifts (that were created as part of a digital photography unit) and have a pizza lunch together. We are looking forward to this new yearly tradition. Thank you to Ms. Morrill and Ms. Benton for coordinating this amazing activity.

ATA Winter Unified Basketball Tournament: On March 24, 2023, Amity Transition Academy (Albertus Magnus) hosted our annual winter unified basketball tournament at the Cosgrove Marcus Messer Athletic Center on the campus of Albertus Magnus College. Students from ATA-UNH Orange, Milford Public Schools, New Haven Public Schools, and Southington Public Schools all participated. Thank you to Ms. Fitzgerald and Albertus Magnus Athletic Director Michael Kobylanski.

Music Outreach: On Thursday, March 9, 2023, Tri-M Music Honor Society and Music for the Community Club performed for the residents at Coachman Square at Woodbridge Senior Living Center.

AMSB 8th Grade Panoramic Picture: The 8th graders will be taking their panoramic class picture on Thursday, April 6, 2023. It's a tradition that was on hiatus during the pandemic and we are happy to have it back.

AMSB School Spirit Day: Wednesday, April 5th is AMSB's next School Spirit Day: Every Day is a Holiday! Students and staff are encouraged to dress up in the theme of any holiday you wish...Ugly Winter Sweaters, Easter Bunnies, 4th of July, Daylight Savings, Earth Day...the more obscure the better!

April 2023

March Ticket Summary

Tickets addressed and closed: 62

Tickets open: 4

HS Student Help Desk

Students helped: 391

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Technology Department Monthly Report

Completed Projects:

- SIP trunk install and configuration for phone system to enable enhanced 911 capabilities
 - Final testing in conjunction with local police departments to be done over April Break

Projects in process:

- Working with Facilities and Building Admin to help plan for upgrades to the Lecture Hall to better serve the District's needs moving forward
- Installing Promethean Boards throughout the High School based on needs
 - 4 boards are left on campus awaiting installation
- All weather stadium data and power installation
 - Steps left are to anchor cabinets and run final conduit between junction boxes and cabinets
 - Need to run power to cabinets to support the climate control units and power needs of the switches
- Schoology early adopters initiative has begun, selected teachers are testing Schoology and providing feedback in preparation for training staff for full implementation in the Fall of 2023
 - Initial training for all teachers not part of the pilot was given during PD on March 16, 2023
 - Additional training for all teachers will occur April 27, 2023
- Doing a full audit of the registration process through PowerSchool to be followed by an update to address any inefficiencies in the current system

Upcoming projects:

- Identified new solution to address the need for a mobile door access control system to allow security to answer and respond to requests for door access while away from their desk.
 - Currently awaiting delivery of the camera modules from Axis

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The backstop netting on the baseball field at ARHS was repaired by our in maintenance technician.
- Electrical outlets were relocated in certain rooms at AMSB by our in house electrician to allow for installation of the new Promethean Boards.
- All kitchen exhaust hoods district wide were cleaned and inspected.

Projects in Process:

- Bids went out at the beginning of January for three projects at ARHS, the chilled water piping, the curtain wall frame, and the lecture hall remodel. Bids were received and reviewed and contracts were awarded. The lecture hall remodel and the chilled water piping are scheduled to start during April break. The curtain wall frame is scheduled for a early June start after school is out.
- All indoor lighting fixtures in AMSO and AMSB are being re-lamped with different bulbs due to problems with existing bulbs. Orange has been completed, Bethany is in progress.
- The glycol loop at AMSO has been flushed and filled, we are waiting until April break to add the final glycol and inhibitor amounts.
- The DESIGO building management system software upgrade for ARHS is wrapping up. All aspects have been completed with the exception of certain graphics still need to be developed as well as training on the new system. The first round of training was held in February with another to be scheduled.
- A meeting was held with the Woodbridge planning and zoning committee to discuss and get approval to add an additional eight parking lot lights from the football field out to North Pease Road. We are awaiting the final decision from P&Z before we can move forward.
- The gym roof and wall panel project for both middle schools was scheduled to go out to bid last month but was delayed. The roof restoration part of the project is out to bid and the wall panel portion will be out to bid the first week of April.
- The patio replacement project for ARHS went out to bid late February, seven bids were received. We reviewed bids and references and a contract was awarded.

Outstanding issues to be addressed:

- The high school track water retention issue is still being reviewed.

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	FEB 23	CHANGE	MAR 23	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
2	OTHER REVENUE	130,512	114,296	207,902	10,000	217,902	103,606	FAV
3	OTHER STATE GRANTS	843,114	844,861	1,026,343	(265,798)	760,545	(84,316)	UNF
4	MISCELLANEOUS INCOME	45,809	41,040	43,872	0	43,872	2,832	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,514,673	53,349,805	53,627,725	(255,798)	53,371,927	22,122	FAV
7	SALARIES	27,429,917	28,830,023	28,559,418	0	28,559,418	(270,605)	FAV
8	BENEFITS	5,464,945	6,046,203	6,154,000	0	6,154,000	107,797	UNF
9	PURCHASED SERVICES	8,856,448	10,234,922	9,369,970	(23,300)	9,346,670	(888,252)	FAV
10	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	3,159,639	3,157,931	3,166,139	5,479	3,171,618	13,687	UNF
12	EQUIPMENT	130,142	86,552	129,670	7,059	136,729	50,177	UNF
13	IMPROVEMENTS / CONTINGENCY	340,143	308,000	186,704	0	186,704	(121,296)	FAV
14	DUES AND FEES	121,969	200,458	196,871	6,200	203,071	2,613	UNF
15	TRANSFER ACCOUNT	929,175	0	0	0	0	0	FAV
16	TOTAL EXPENDITURES	50,886,213	53,349,805	52,248,488	(4,562)	52,243,926	(1,105,879)	FAV
17	SUBTOTAL	628,466	0	1,379,237	(251,236)	1,128,001	1,128,001	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	83,471	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	711,937	0	1,379,237	(251,236)	1,128,001	1,128,001	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	FEB 23	CHANGE	MAR 23	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	8,983,609	8,918,279	8,918,279	0	8,918,279	0	FAV
2	ORANGE ALLOCATION	25,236,005	26,367,974	26,367,974	0	26,367,974	0	FAV
3	WOODBRIIDGE ALLOCATION	16,275,624	17,063,355	17,063,355	0	17,063,355	0	FAV
4	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
6	ADULT EDUCATION	4,341	4,000	4,000	0	4,000	0	FAV
7	PARKING INCOME	31,146	32,400	32,400	0	32,400	0	FAV
8	INVESTMENT INCOME	4,975	5,000	40,000	10,000	50,000	45,000	FAV
9	ATHLETICS	26,516	24,000	24,000	0	24,000	0	FAV
10	TUITION REVENUE	44,034	25,496	85,402	0	85,402	59,906	FAV
11	TRANSPORTATION INCOME	19,500	23,400	22,100	0	22,100	(1,300)	UNF
12	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
13	OTHER REVENUE	130,512	114,296	207,902	10,000	217,902	103,606	FAV
14	OTHER STATE GRANT	0	0	0	0	0	0	FAV
15	SPECIAL EDUCATION GRANTS	843,114	844,861	1,026,343	(265,798)	760,545	(84,316)	UNF
16	OTHER STATE GRANTS	843,114	844,861	1,026,343	(265,798)	760,545	(84,316)	UNF
17	RENTAL INCOME	23,158	18,000	24,000	0	24,000	6,000	FAV
18	INTERGOVERNMENTAL REVENUE	4,893	5,040	1,872	0	1,872	(3,168)	UNF
19	OTHER REVENUE	17,758	18,000	18,000	0	18,000	0	FAV
20	TRANSFER IN	0	0	0	0	0	0	FAV
21	MISCELLANEOUS INCOME	45,809	41,040	43,872	0	43,872	2,832	FAV
22	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
23	TOTAL REVENUES	51,514,673	53,349,805	53,627,725	(255,798)	53,371,927	22,122	FAV

Column 7: FAV=Favorable Variance
Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	FEB 23	CHANGE	MAR 23	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	22,456,125	23,647,192	23,461,462	0	23,461,462	(185,730)	FAV
2	5112-CLASSIFIED SALARIES	4,973,792	5,182,831	5,097,956	0	5,097,956	(84,875)	FAV
3	SALARIES	27,429,917	28,830,023	28,559,418	0	28,559,418	(270,605)	FAV
4	5200-MEDICARE - ER	381,832	423,336	423,336	0	423,336	0	FAV
5	5210-FICA - ER	301,888	315,346	315,346	0	315,346	0	FAV
6	5220-WORKERS' COMPENSATION	152,365	175,153	144,706	0	144,706	(30,447)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,647,858	4,018,260	4,018,260	0	4,018,260	0	FAV
8	5860-OPEB TRUST	0	155,474	267,232	0	267,232	111,758	UNF
9	5260-LIFE INSURANCE	46,418	55,110	59,735	0	59,735	4,625	UNF
10	5275-DISABILITY INSURANCE	10,736	11,757	12,873	0	12,873	1,116	UNF
11	5280-PENSION PLAN - CLASSIFIED	764,395	725,924	725,924	0	725,924	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	145,496	153,143	153,143	0	153,143	0	FAV
12	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	12,498	10,500	31,245	0	31,245	20,745	UNF
16	5291-CLOTHING ALLOWANCE	1,459	2,200	2,200	0	2,200	0	FAV
17	BENEFITS	5,464,945	6,046,203	6,154,000	0	6,154,000	107,797	UNF
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	28,159	10,000	15,007	0	15,007	5,007	UNF
19	5327-DATA PROCESSING	105,023	131,078	131,078	0	131,078	0	FAV
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,853,092	2,063,594	2,507,527	(6,200)	2,501,327	437,733	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	82,148	116,525	116,525	0	116,525	0	FAV
22	5510-PUPIL TRANSPORTATION	3,441,389	3,933,934	3,679,496	(17,100)	3,662,396	(271,538)	FAV
23	5521-GENERAL LIABILITY INSURANCE	282,790	278,907	320,326	0	320,326	41,419	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	117,699	114,492	114,492	0	114,492	0	FAV
25	5560-TUITION EXPENSE	2,867,711	3,495,200	2,394,327	0	2,394,327	(1,100,873)	FAV
26	5590-OTHER PURCHASED SERVICES	78,437	91,192	91,192	0	91,192	0	FAV
27	PURCHASED SERVICES	8,856,448	10,234,922	9,369,970	(23,300)	9,346,670	(888,252)	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	FEB 23	CHANGE	MAR 23	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
28	5830-INTEREST	788,835	788,835	788,835	0	788,835	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,665,000	3,696,881	3,696,881	0	3,696,881	0	FAV
30	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	588,882	709,704	709,704	0	709,704	0	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	943,020	731,680	718,961	0	718,961	(12,719)	FAV
33	5611-INSTRUCTIONAL SUPPLIES	328,840	366,812	365,392	0	365,392	(1,420)	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	189,616	225,305	225,305	(7,059)	218,246	(7,059)	FAV
35	5620-OIL USED FOR HEATING	40,302	47,500	47,500	0	47,500	0	FAV
36	5621-NATURAL GAS	73,394	69,941	84,403	12,538	96,941	27,000	UNF
37	5627-TRANSPORTATION SUPPLIES	102,352	143,809	143,809	0	143,809	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	237,915	154,742	154,742	0	154,742	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	20,852	20,857	16,023	0	16,023	(4,834)	FAV
40	5690-OTHER SUPPLIES	634,466	241,071	253,790	0	253,790	12,719	UNF
41	5695-OTHER SUPPLIES-TECHNOLOGY	0	446,510	446,510	0	446,510	0	FAV
42	SUPPLIES (INCLUDING UTILITIES)	3,159,639	3,157,931	3,166,139	5,479	3,171,618	13,687	UNF
43	5730-EQUIPMENT - NEW	92,453	13,012	13,012	0	13,012	0	FAV
44	5731-EQUIPMENT - REPLACEMENT	37,689	5,980	49,098	7,059	56,157	50,177	UNF
45	5732-EQUIPMENT - TECH - NEW	0	63,960	63,960	0	63,960	0	FAV
46	5733-EQUIPMENT - TECH - REPLACEMENT	0	3,600	3,600	0	3,600	0	FAV
47	EQUIPMENT	130,142	86,552	129,670	7,059	136,729	50,177	UNF
48	5715-IMPROVEMENTS TO BUILDING	67,775	19,000	89,935	0	89,935	70,935	UNF
48a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
48b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(100,000)	0	(100,000)	(100,000)	FAV
49	5720-IMPROVEMENTS TO SITES	272,368	39,000	39,000	0	39,000	0	FAV
50	5850-DISTRICT CONTINGENCY	150,000	150,000	150,000	0	150,000	0	FAV
50a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	(92,231)	0	(92,231)	(92,231)	FAV
50c	IMPROVEMENTS / CONTINGENCY	340,143	308,000	186,704	0	186,704	(121,296)	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	FEB 23	CHANGE	MAR 23	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./((DEC.))	FORECAST	OVER/(UNDER)	UNF
51	5580-STAFF TRAVEL	8,203	21,700	18,800	0	18,800	(2,900)	FAV
52	5581-TRAVEL - CONFERENCES	32,992	70,475	69,788	6,200	75,988	5,513	UNF
53	5810-DUES & FEES	80,774	108,283	108,283	0	108,283	0	FAV
54	DUES AND FEES	121,969	200,458	196,871	6,200	203,071	2,613	UNF
55	5856-TRANSFER ACCOUNT	<i>929,175</i>	0	0	0	0	0	FAV
55a	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
56	TOTAL EXPENDITURES	50,886,213	53,349,805	52,248,488	(4,562)	52,243,926	(1,105,879)	FAV
56	RESTRICTED - CARRY OVER FUNDS/RETURN TO							
Note:	TOWNS	711,937						

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2022-2023**



MARCH 2023

2022-2023 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$1,128,001 FAV previously \$1,379,237 FAV, which appears on page 1, column 6, and line 20. The unspent funds from fiscal year 2022 funds (\$711,931) were deducted from the town allocations in March. This administration will request up to 2% of any available surplus as an end-of-year transfer. The appropriation request to the capital and non-recurring account will be shown on line 55 of the Excel file if funds become available during the year. The District is legally allowed to transfer with Board approval up to 2% or \$1,066,995 of the current budget. The item will be presented after the final balance for FY23 is confirmed at the August 2023 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is \$22,122 FAV, previously \$277,920 UNF, which appears on page 2, column 6, line 23.

LINE 6 on Page 2: ADULT EDUCATION:

The forecast is based on historical State payments. *The forecast is neutral.*

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

LINE 8 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. *The forecast is \$45,000 FAV, previously \$40,000 FAV.*

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2022	.398%	.1620%
August 2022	.398%	2.24%
September 2022	.350%	2.49%
October 2022	.400%	3.13%
November 2022	.400%	3.92%
December 2022	.400%	4.12%
January 2023	.396%	4.59%
February 2023	.400%	4.61%

LINE 9 on Page 2: ATHLETICS:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

LINE 10 on Page 2: TUITION REVENUE:

The budget is based on two tuition students, one at a reduced employee rate. **Full tuition rate is \$20,142.** *We have four students at the employee reduced rate and three students at the full rate.* The actual tuition charged is higher (\$972 per year). *The forecast is \$59,906 FAV, previously \$59,906 FAV.*

LINE 11 on Page 2: TRANSPORTATION INCOME:

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. *The forecast is \$1,300 UNF based on current data, previously \$1,300 UNF.*

LINE 15 on Page 2: SPECIAL EDUCATION GRANTS:

The current projection is based on budgeted costs for placements and transportation. The budget assumes a 73% reimbursement rate. The State passed legislation which reduced the District's reimbursement rate to 70%. The estimated deduction of \$34,809 is forecasted. The changes in services provided to students and the overall number of students in programs reflects a savings in the tuition and transportation expense accounts. The reduction in costs also impact the anticipated revenue from the State. *The current estimate based on student enrollment, services and State funding is \$84,316 UNF previously \$181,482 FAV. The State increased the reimbursement rate to 85% under an emergency certification action in late February. March forecast reported the revenue based on the budgeted number of students, which was incorrect. The report now reflects the most recent data filed on March 1 with the new reimbursement rate applied.*

LINE 17 on Page 2: RENTAL INCOME:

The forecast is based on the budget developed on estimated payments for the fiscal year. *The forecast is \$6,000 FAV, previously neutral.*

LINE 18 on Page 2: INTERGOVERNMENTAL INCOME:

The forecast is based on the budget developed on historical payments. *The forecast is \$3,168 UNF previously \$3,168 UNF* The agreement was paused due to a staffing shortage.

LINE 19 on Page 2: OTHER REVENUE:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$1,105,879 FAV, previously, \$1,101,317 FAV* which appears on page 5, column 6, line 56.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on budget. There are still vacant positions. Current turnover savings exceeded the budget by \$76,226 FAV. The vacancy factor has also exceeded the budget since several positions are filled with long-term substitutes. We continue to experience staff vacancies and are not yet fully staffed. *The account is currently forecasted at \$185,730 FAV, previously \$185,730 FAV. There is a significant increase in teacher coverages utilized to fill vacant positions.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. *There are still vacant positions across most groups, including a nurse and several paraeducators. The forecast is currently \$84,875 FAV, previously \$87,548 FAV. There is still a higher turnover rate occurring and we are not yet fully staffed.*

LINES 4 & 5 on Page 3: 5200 & 5210-MEDICARE & FICA:

The forecast is based on the budget.

LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:

The workers' compensation premium is less than budgeted and the forecast assumes the payroll audit will be as budgeted. Member equity distribution was received for *\$22,298 FAV*. The renewal policy is \$8,149 FAV less than budgeted. We are provided the maximum premium number during the fiscal year and at the time of renewal, July 1, the final premium is calculated. *Total savings YTD \$30,447 FAV.*

LINES 7 on Page 3: 5255-MEDICAL AND DENTAL INSURANCE:

The following charts are included to track how the District's actual claims are comparing against the expected claims. How claims are running for the year has always been a common question, so the charts for claims and fees are shown monthly. However, claims are one piece of the medical budget line shown in the Excel file. Fees, employee contributions, grant funding, employer contributions to employee HSA accounts and reserve funding are other factors built into the Medical and Dental Insurance Budget. The claims chart in the Word document will not equal the Excel line since it is only one factor of the data comprising the medical budget. Certainly a significant factor which is why it is given in detail below. *Claims are running 92.4% of budget. It is important to note that if we were fully staffed it is likely our claims would be overbudget.*

The forecast projects actual claims and fees of current employees and retirees will be neutral with the budget, however claims are more than the month-to-month forecast. The projected monthly budget is based on an average of five years of claims.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2022-2023 ACTUAL	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
<i>JUL*</i>	\$ 34,837	\$ 416,087	\$ (381,250)	\$ 530,877	\$ 256,509
<i>AUG</i>	\$ 798,616	\$ 402,727	\$ 395,889	\$ 405,635	\$ 200,490
<i>SEP</i>	\$ 551,212	\$ 384,095	\$ 167,117	\$ 364,327	\$ 292,575
<i>OCT</i>	\$ 297,594	\$ 375,480	\$ (77,886)	\$ 341,109	\$ 293,360
<i>NOV</i>	\$ 306,068	\$ 458,947	\$ (152,879)	\$ 324,557	\$ 409,279
<i>DEC</i>	\$ 435,108	\$ 566,109	\$ (131,001)	\$ 767,843	\$ 489,999
<i>JAN</i>	\$ 311,328	\$ 353,446	\$ (42,118)	\$ 320,277	\$ 253,077
<i>FEB</i>	\$ 190,062	\$ 273,133	\$ (83,071)	\$ 176,127	\$ 259,775
<i>MAR</i>	\$ 313,582	\$ 354,451	\$ (40,869)	\$ 263,761	\$ 255,965
<i>APR</i>	\$ 323,033	\$ 323,033	\$ -	\$ 328,046	\$ 304,485
<i>MAY</i>	\$ 305,994	\$ 305,994	\$ -	\$ 183,944	\$ 235,252
<i>JUN</i>	\$ 328,580	\$ 328,580	\$ -	\$ 371,250	\$ 274,741
TOTALS	\$ 4,196,014	\$ 4,542,083	\$ (346,069)	\$ 4,377,753	\$ 3,525,507

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2018-2019 ACTUAL	2019-2020 ACTUAL	2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 FORECAST
92.2%	84.1%	75.8%	97.3%	92.4%

*Incomplete billing cycle

FEEES OF CURRENT EMPLOYEES AND RETIREES
(Stop-Loss Premiums, Network Access Fees, and Other Fees)

MONTH	2022-2023 ACTUAL	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
<i>JUL</i>	\$ 30	\$ 49,997	\$ (49,967)	\$ 14,068	\$ 53,562
<i>AUG</i>	\$ 83,030	\$ 53,423	\$ 29,607	\$ 74,642	\$ 50,187
<i>SEP</i>	\$ 61,858	\$ 45,088	\$ 16,770	\$ 46,923	\$ 53,804
<i>OCT</i>	\$ 47,063	\$ 51,048	\$ (3,985)	\$ 47,049	\$ 55,100
<i>NOV</i>	\$ 50,445	\$ 42,200	\$ 8,245	\$ 39,556	\$ 56,242
<i>DEC</i>	\$ 52,888	\$ 39,812	\$ 13,076	\$ 51,770	\$ 55,608
<i>JAN</i>	\$ 25,978	\$ 36,118	\$ (10,140)	\$ 48,349	\$ 11,403
<i>FEB</i>	\$ 46,388	\$ 44,037	\$ 2,351	\$ 81,821	\$ 94,489
<i>MAR</i>	\$ 74,389	\$ 38,241	\$ 36,148	\$ 34,780	\$ 80,240
<i>APR</i>	\$ 38,834	\$ 38,834	\$ -	\$ 37,237	\$ 54,687
<i>MAY</i>	\$ 40,369	\$ 40,369	\$ -	\$ 41,664	\$ 59,398
<i>JUN</i>	\$ 36,858	\$ 36,858	\$ -	\$ 44,118	\$ 50,341
TOTALS	\$ 558,129	\$ 516,024	\$ 42,105	\$ 561,977	\$ 675,061

LINE 8 on Page 3: 5860-OPEB TRUST:

The forecast reflects making the full Actuarial Required Contribution (ARC) that was developed for the current budget. \$111,758 was cut during the FY23 budget deliberations in order to reduce the budget increase. Fully funding the ARC will help lower future budget costs and reflects positively on the District's bond rating. If funds are available, the budget transfer will be requested in May 2023. \$111,758 UNF.

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on premiums for current staff, \$4,625 UNF, previously \$4,625 UNF.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based is \$1,116 UNF previously, \$1,116 UNF based on current staff.

LINE 12 on Page 3: 5281-DEFINED CONTRIBUTION RETIREMENT PLAN:

The forecast is based on budget.

LINE 15 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on actual charges year-to-date and estimates for the remainder of the year, \$20,745 UNF, previously \$8,990 UNF.

LINE 20 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:

The forecast is based on budget. Two special education positions are expected to be vacant through October 2022. Consultants will be substituting until permanent replacements can be hired and to provide advanced behavioral support services for students, **\$437,733 UNF, previously, \$393,853 UNF.** A transfer was approved in November for robotics. The State has mandated every school district have a uniform inspection and evaluation of their HVAC systems conducted by a licensed professional. The estimated cost is \$113,000 for the evaluations at all three buildings. A transfer was approved in January to cover this mandate announced after the current budget was adopted. A contract approval for our current HVAC engineers was also approved to ensure we can be scheduled for the summer in order to meet compliance with the January 2024 deadline. Transfers were approved in February for special education contracted services for \$126,591. Additional transfers were approved in March for contract services to meet special education student needs, \$50,080 UNF. **A transfer is requested this month to cover special education professional development conferences, \$6,200 UNF.**

LINE 21on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 22 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation continues to fluctuate to meet student enrollment and needs. *The number of students transported each month as well as the facilities students are transported to each month varies. Net to date, the transportation accounts are \$271,538 FAV, previously, \$254,438 FAV.*

LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional, public bond and cyber insurance renewed higher

than budgeted while Student Accident insurance renewed under budget. **Account is \$41,419 UNF previously \$41,419 UNF.**

LINE 24 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:

The forecast is based on budget.

LINE 25 on Page 3: 5560-TUITION EXPENSE:

Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. *The forecast currently reflects \$1,100,873 FAV, previously, \$1,100,873 FAV for various tuitions.* Several students are returning to the District from outplacements. Vo-Ag, Vo-Tech and Magnet school enrollment has increased offsetting some of these savings. Savings are anticipated on these lines but large transfers were requested to address student needs in the District.

Tuition for the Vo-Ag schools is \$3,351 UNF, previously \$3,351 FAV.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
Sound	4	6	5	3	5	3(3)
Trumbull	6	4	3	1	3	3(3)
Nonnewaug	4	5	7	9	9	7(7)
Common Ground Charter HS	0	0	1	1	1	3(3)
Fairchild Wheeler	0	0	0	0	1	0(0)
Emmett O'Brien	0	0	0	0	0	2(2)
Hill Career Magnet	0	0	0	0	0	1(1)
Wintergreen Magnet	0	0	0	1	0	0(0)
Marine Science Magnet HS	0	0	0	0	0	1(1)
Eli Whitney Tech	0	0	0	0	0	0(0)
Engineering Science Magnet	1	0	0	0	0	0
Highville Charter School	1	0	0	0	0	0
Totals	16	15	16	15	18	(20) 20

ECA is \$1,812 UNF, previously \$1,812 UNF.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
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ECA	24	21	16	18	18	(19) 19
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Public (ACES) and private out-of-district placements are \$1,106,036 FAV, previously \$1,110,826 FAV.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
Public SPED	11	8	6	10	12	9(9)
Private SPED	22	18	27	20	24	20(20)
Totals	33	26	33	30	36	29(29)

LINE 26 on Page 3: 5590-OTHER PURCHASED SERVICES:

The forecast is based on the budget.

LINE 31 on Page 4: 5410-UTILITIES, EXCLUDING HEAT:

The 2022-2023 budget for electricity assumes the use of 3,310,001 kilowatt hours at an average price of 0.1931 or a cost of \$618,404. Forecast is neutral.

The budget assumes there will not be a Load Shed credit.

The budget for propane is \$3,546. *The forecast is projected to be neutral.*

The budget for water is \$57,350. *The forecast is projected to be neutral.*

Sewer costs are budgeted at \$25,000. *The forecast is projected to be neutral.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2022-2023 FORECAST	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
<i>JUL</i>	325,263	263,361	61,902	296,292	254,686
<i>AUG</i>	350,459	292,763	57,696	321,023	299,439
<i>SEP</i>	294,292	313,930	(19,638)	314,756	285,993
<i>OCT</i>	252,949	295,084	(42,135)	272,755	248,089
<i>NOV</i>	252,160	269,094	(16,934)	256,208	238,583
<i>DEC</i>	245,784	274,129	(28,345)	259,994	240,912
<i>JAN</i>	262,051	283,552	(21,501)	257,539	249,595
FEB	280,114	280,114	-	271,979	243,774
MAR	263,718	263,718	-	255,631	246,886
APR	274,727	274,727	-	255,629	254,711
MAY	252,686	252,686	-	277,953	244,685
JUN	246,843	246,843	-	296,900	290,054
Totals	3,301,046	3,310,001	(8,955)	3,336,659	3,097,407

DEGREE DAYS

There are 3,841 degree days to date as opposed to 4,340 last year.

LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE: The forecast is projected to be under budget, \$12,719 FAV due to less snow removal to date, previously neutral. A transfer was approved in February from the snow removal estimates for door window coverings utilized during lockdowns. *The forecast is projected to be \$12,719 FAV.*

LINE 34 on Page 4: 5613-MAINTENANCE SUPPLIES: The forecast is projected to be under budget, \$7,059 FAV. A transfer is requested this month to cover the cost of replacing one of the auto shop lifts. *The forecast is projected to be \$7,059 FAV, previously neutral.*

LINE 35 & 36 on Page 4: 5620 & 5621-OIL & NATURAL GAS: The budget for natural gas is \$68,171 and the budget for oil is \$41,000. *The forecast is projected to be over budget based on year to date costs, \$27,000 UNF, previously \$14,462 UNF.*

LINE 40 on Page 4: 5690 OTHER SUPPLIES: Classroom and interior office door windows should be covered during a lockdown. Mr. Martoni researched product that are UL rate, can be installed by in-house staff, and easily accessible during a lockdown. School Safety Solution has various sized coverings for the classroom and interior office door windows. This was not a budgeted item but is a recommendation from a national conference on security. There is a transfer requested from the snow removal estimates approved in February for this purchase. *The forecast is projected to be \$12,719 UNF.*

LINE 43 on Page 4: 5730-EQUIPMENT -NEW:
The forecast is projected to be neutral.

LINE 44 on Page 4: 5731-EQUIPMENT -REPLACEMENT: The Board approved a transfer \$8,296 for replacement security cameras. There are 6 cameras in the District that are not functional and need replacing. A transfer was approved in November for a scoreboard replacement at \$4,834. **The account is \$50,177 UNF, previously \$43,118 UNF.** A transfer was approved in December for robotics equipment. **A transfer is requested this month to cover the cost of a lift replacement, \$7,059 UNF.**

LINE 48a on Page 4: 5715-FACILITIES CONTINGENCY: The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. A transfer to professional services was approved in January to cover the cost of an unfunded State mandate to have their HVAC systems inspected and evaluated. The total cost is estimated at \$113,000. The balance in facility contingency is zero. A transfer was approved in February for the high school curtain wall at \$70,935.

LINE 50 on Page 4: 5850-CONTINGENCY:

The budget includes a \$150,000 contingency for unplanned, necessary expenditures. The forecast assumes these funds will be entirely used. The Board approved a transfer replacing 6 security cameras that are not functional. The balance in contingency is \$141,704 FAV. A transfer to professional services is requested this month to cover the cost of an unfunded State mandate to have their HVAC systems inspected and evaluated. The total cost is estimated at \$113,000 of which \$100,000 is requested from facilities contingency and the remaining \$13,000 from the general contingency. A transfer was approved in February for the high school curtain wall at \$70,935. *The balance in contingency is \$57,769 FAV.*

LINES 51 & 52 on Page 5: 5580 & 5581-STAFF TRAVEL/CONFERENCES:

A transfer is requested this month for special education conference, \$6,200 UNF. The account will be \$5,513 UNF.

LINE 55 on Page 5: 5856-TRANSFER:

This line is used to identify funds for the Capital and Nonrecurring Account transfers. The District is legally allowed to transfer with Board approval up to 2% or \$1,066,995 of the current budget. The item will be presented after the final balance for the FY23 is confirmed at the August 2023 meeting.

LINE 56 on Page 5: CARRY OVER FUNDS:

The line is for the carry over funds from FY22. The use of funds is based on legal guidance and may be applied to next year's budget. \$711,934 FAV. This is comprised of \$628,463 of unspent funds in FY22 and unliquidated encumbrances from FY21 of \$83,471. *The town allocations were reduced by the full amount of \$711,937 in March 2023.*

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2022-2023

TOTAL ANNUAL SAVINGS TO-DATE OF: \$42,565

\$13,119 Cable Advisory Grant: The Director of Technology applied for funds to purchase cameras for the redesigned lecture hall. These cameras will improve the quality of broadcasting for public meetings. The cameras will also be used in the curriculum. This reduces the amounts that would be funded through the general fund.

\$18,446 E-Rate Credits: The District's application for E-Rate credits is approved. The amount reflects discounted invoices for the CEN – state provided internet connection.

\$11,000 Facilities Repairs: Several projects were completed in-house over the summer by our staff, saving costs from outside contractors. Projects included:
Replacing auditorium air handler motor in-house: estimated \$2,000 savings in labor;
Refinishing art room tables: estimated \$7,000 as new tables of that type run between \$100-\$1,500 ; Dishwasher installation electrical work: estimated \$1,500 in labor;
Installation of the rubber gym floor at AMSO, estimated \$500 in labor.

There is a detailed history of the District's efforts to save dollars and operate efficiently. This information is posted on the District's website:

- Energy Savings Initiatives for the past decade
<http://www.amityregion5.org/boe/sub-committees/finance-committe>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>
- Fiscal Year 2021-22- <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2020-2021 - \$128,708 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2019-2020 - \$43,497 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2018-2019 - \$52,451 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2017-2018 – \$746,688 <https://www.amityregion5.org/boe/sub-committees/finance-committee>

- Fiscal Year 2016-2017 – \$595,302 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2015-2016 – \$125,911 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2014-2015 – \$139,721 <http://www.amityregion5.org/boe/sub-committees/finance-committee>

APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

A forecast is a prediction or estimate of future events and trends. **It is only as good as the data available and the assumptions used.** We use current information and past history.

There are many factors, which can significantly impact expenditures, both positively and negatively (e.g., staff turnover, vacancies and leaves-of absence; medical and dental insurance claims when self-insured; special education expenditures; major facility repairs; snow removal).

Two of the three past fiscal years were significantly impacted by the COVID-19 pandemic. School operations were halted or modified and not at 100% for either year. The District staff took many steps to reserve the general operating budget to meet the demands and brace for the unknown costs. Nearly one million dollars was held from accounts to prepare for operations in fiscal year 2021. Grant funding from State and Federal sources became available during the year. These funds were used to offset unexpected costs and plan for the future costs. Some of the funds do not expire until September 2024. The administration is planning to use funds as required by grant guidelines while limiting the impact to future budgets. The most recent fiscal year, 2022, also reflects an increase from May to June forecast but is offset by an increase to the Capital Nonrecurring Account request from 1% to 2%.

To illustrate, a special education student could move into the District in mid-year and the cost impact could be over \$100,000 and/or we could have a 'bad claims year' and wipe out the Self Insurance Reserve Fund and need other funds to cover claims of current employees and retirees. If we do not have available funds to cover these and other potential shortfalls, the necessity to seek additional funding from the public would be our only option (as only the towns have a fund balance from prior years available to use in the case of an emergency).

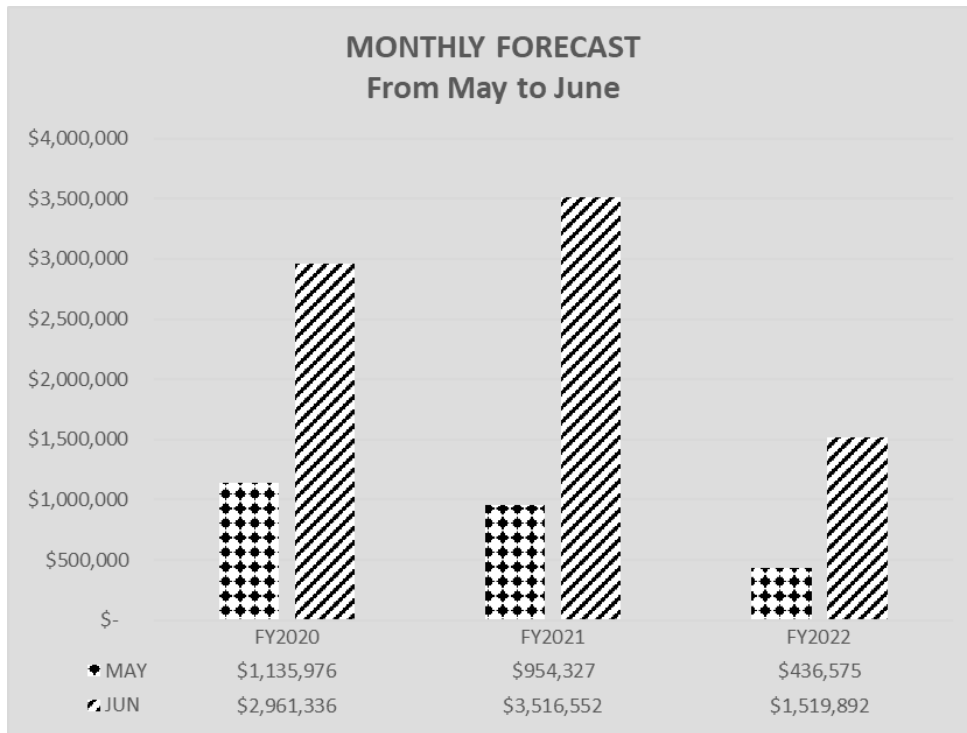
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we 'hold back' on spending any of the Contingency Account until it is absolutely necessary or we are close to yearend. The Superintendent of Schools and Director of Finance and Administration review and approve or deny all purchase orders. We are careful to make sure funds are only spent when necessary and not just because 'it is in the budget'. We are constantly faced with the 'what-ifs' of over expenditures in certain accounts. We need to be sure there are sufficient funds available. As a result, the fund balance has been larger towards the end of the fiscal year.

Furthermore, the monthly forecasts are based on the information available. We have had large, unexpected or highly unpredictable events at the end of the fiscal year (mostly of a positive nature), which significantly changed the forecast from May to June.

HISTORICAL:

The chart below depicts the yearend balance projected in May and June of each of the past three fiscal years.



The major contributors of the significant change from the May to June forecasts are detailed below.

FY2020:

The audited fund balance is \$1,950,777 after \$515,077 in EOY purchases and allocation of 1% or \$492,485 appropriated to Capital and Nonrecurring Account . The monthly forecast for May 2020 projected a fund balance of \$1,135,976. The change is **\$815,982 higher than the prior month's forecast**. The major reasons for the significant increase in the yearend fund balance was the unsettled environment of the COVID-19 global pandemic. As of the May 2020 meeting, the Governor had not announced if schools would reopen prior to the end of the school year. School was eventually cancelled for the remainder of the year and almost all accounts were impacted. The changes from one month to the next month were, as follows:

- **\$121,462:** Certified and classified salaries were lower due to the school closures. Spring coaches salaries were reduced, substitutes and coverages were not needed, staff development hours, homebound instruction, chaperone duties, and overtime were all near zero.

- **\$296,642:** Medical & dental claims were lower due to the COVID-19 global pandemic. Routine office visits and medical tests were postponed all spring across the region. Since we are self-insured, actual claims are not known until the end of the fiscal year. Unemployment claims, though high were lower than May's estimate. The District has not experienced claims of this magnitude and estimating the actual costs were difficult. Many claims were in dispute. The change was \$26,000 FAV.
- **\$155,607** Purchased services were lower due to the COVID-19 global pandemic. There were no athletic contests, which reduced the annual number of game day staff and officials paid. Less need for printed materials, postage, end of year celebrations, graduation and stepping up costs, and athletic rentals were less due to the social distancing requirements.
- **\$76,091:** Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. Contracts were renegotiated in May but with school cancellation final for the year, additional savings resulted. There were no late runs, athletic trips, or field trips at the end of the year.
- **\$70,483:** Instructional supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials.
- **\$54,739:** Communication costs were lower due to the COVID-19 global pandemic. Less postage, copy paper, and catering needs due to the remote learning environment.
- **\$35,521:** Rentals for fields, tables, chairs, tents, etc. were lower due to the COVID-19 global pandemic. End of year athletic contests were cancelled and ceremonies were done in a socially distance manner which eliminated the need for many items used for large crowd gatherings.
- **\$14,945:** Electricity usage was lower due to the COVID-19 global pandemic. Buildings had a few occupants during the March through June timeframe.

FY2021:

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$185,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 proposed for capital nonrecurring account. ***The change is \$2,991,592 higher than the prior month's forecast. The major reasons for the significant increase in the yearend fund balance was the continuing unsettled environment of the COVID-19 global pandemic. The changes from one month to the next month are summarized as follows:***

- **\$609,645:** Medical & dental claims were lower and the assumption is it is due to the COVID-19 global pandemic. Routine office visits and medical tests may not have resumed to normal levels. Since we are self-insured, actual claims are not known until the end of the fiscal year.

- **\$260,880** Purchased services were lower due to the COVID-19 global pandemic. There were fewer athletic contests, which reduced the annual number of game day staff and officials paid. Less costs were incurred for special education than anticipated.
- **\$147,390:** Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. There were no field trips or late runs during the year. As the schools edged toward operating at 100% it was difficult to predicate if transportation needs would increase in May and June. There were also a reduced number of athletic trips. The fuel bills from the member towns are not finalized until mid-July. The final invoices were less than allotted.
- **\$111,272:** Instructional supplies and maintenance supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials. Grant funding became available to reimburse \$96,980 of cleaning supplies.

FY2022:

The audited fund balance is \$523,678. ***This surplus from prior year is carried over into the FY23 budget as a revenue surplus to be applied to the FY24 budget.*** The monthly forecast for May 2022 projected a fund balance of \$436,575 which included \$516,982 designated for the capital non-recurring account (CNR). The change is **\$566,366 higher than the prior month's forecast including the increase from 1% to 2% to CNR.** The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$102,543:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. Many unpaid leaves occur at the end of the school year. We use conservative estimates in the forecasts based on past history. Overtime and substitute needs are greatest in the final months of the school year due to many extracurricular activities. We hired more in-house substitutes to offset outside agency costs and it proved to be effective.
- **\$33,278:** Medical insurance claims and associated costs were \$27,846 lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Payroll taxes, life insurance and defined contribution payments were less based on vacant positions.
- **\$344,647** Purchased services were lower than forecasted. This included \$57,363 lower transportation and rental costs for athletics. Transportation needs are partially determined by a team's advancement in tournament play during the year and are difficult to gauge. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.

- **\$83,850:** Electrical and water consumption was lower than anticipated. Instructional supplies were less than anticipated.
- **(\$516,982) Capital and Nonrecurring (CNR) Account:** The positive variances above were offset by increasing the CNR request from 1% to 2% based on new information regarding the carrying over of fund balances. The Board approved \$929,175 or 1.80% in August 2022.

APPENDIX C

RECAP OF 2019-2020

Return Unspent Fund Balance:

The cancellation of 2018-2019 encumbrances of \$35,457 will be returned to the Member Towns. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill) and we do not need to spend the entire encumbrance. Once the audit is final for 2019-2020, the funds will be returned.

<i>Bethany</i>	<i>\$ 6,839</i>
<i>Orange</i>	<i>\$ 17,792</i>
<i>Woodbridge</i>	<i><u>\$ 10,825</u></i>
<i>Total</i>	<i>\$ 35,457</i>

The audited fund balance for 2019-2020 is \$1,950,777, after the 1% or \$495,482 is transferred to the Capital Nonrecurring Account. The fund balance is net of \$515,077 of end-of-year expenditures that are posted in FY20. The source of the available funds are described below.

SUMMARY:

The monthly financial report for February 2020 as reported at the March AFC & BOE meetings forecasted a fund balance of \$799,396. Days later, on March 12, 2020, the District cancelled in-person instruction and learning. Most employees continued to work with the exception of substitute teachers. The hours of operation were still severely impacted as all after-school, weekend and evening activities were cancelled. This came at a time when schools would typically operate on extended schedules to accommodate sporting activities, overnight field trips, school plays, award ceremonies, stepping up and graduation ceremonies. Busses did not operate for 58 days in the District. Buildings remained open but with minimal staff as the majority of staff worked remotely, reducing utilities consumption. Contracts for professional services were re-negotiated or cancelled as were rentals of other fields, tables, and tents. Overtime and staff travel was non-existent and only a few conferences were held (via remote features).

FINANCIAL MANAGEMENT:

\$ 107,610

The turnover factor exceeded the budget by \$70,559. Administrators carefully consider salary placement for new hires. Some part-time vacancies were not filled during the shut-down. Liability, workers' compensation, and student accident insurance coverages were negotiated at a lower rate than anticipated, \$37,051.

SPECIAL EDUCATION:

\$ 580,502

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's

special education expenditures. The State reimbursement rate fluctuates throughout the year. Expenses were down \$580,502 prior to the shutdown.

SALARIES, MEDICAL, PURCHASED SERVICES (OTHER): \$2,273,224

\$627,603 SALARIES (OTHER): Teacher coverages, substitute costs, coaching stipends, overtime, homebound services, and chaperone stipends were some of the budgeted items affected by the remote instruction environment. Payroll taxes were down as result of the lower payroll costs. All after-school, evening and weekend activities were cancelled for typically the busiest time of the school year.

\$926,221 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were lower than budgeted as hospitals and doctors suspended routine visits, diagnostic tests, and non-emergency procedures amid the pandemic. The insurance claims were running at 95.7% of budget through February 2020 and fell to 81.3% by the end of the year. Dental claims were near zero during the final quarter of the fiscal year.

\$228,156 TRANSPORTATION SERVICES: (OTHER): School busses did not transport students for daily runs, late runs, athletic events or extra-curricular activities from mid-March through the end of the school year. The daily contract was re-negotiated with transportation contractors while other services were cancelled entirely. Fuel cost were reduced as a result of the shutdown.

\$82,664 PURCHASED SERVICES (OTHER): Purchased services costs were lower due to several factors. Cancellation of spring sports resulted in fewer athletic contests and fewer officials, monitors, and scorekeepers, \$32,000 FAV; \$26,000 FAV was saved for contracted services changes with a less expensive provider and training of in-house staff, \$14,000 FAV was not spent on end of year programs and events; \$8,955 FAV was left from the NEASC budget.

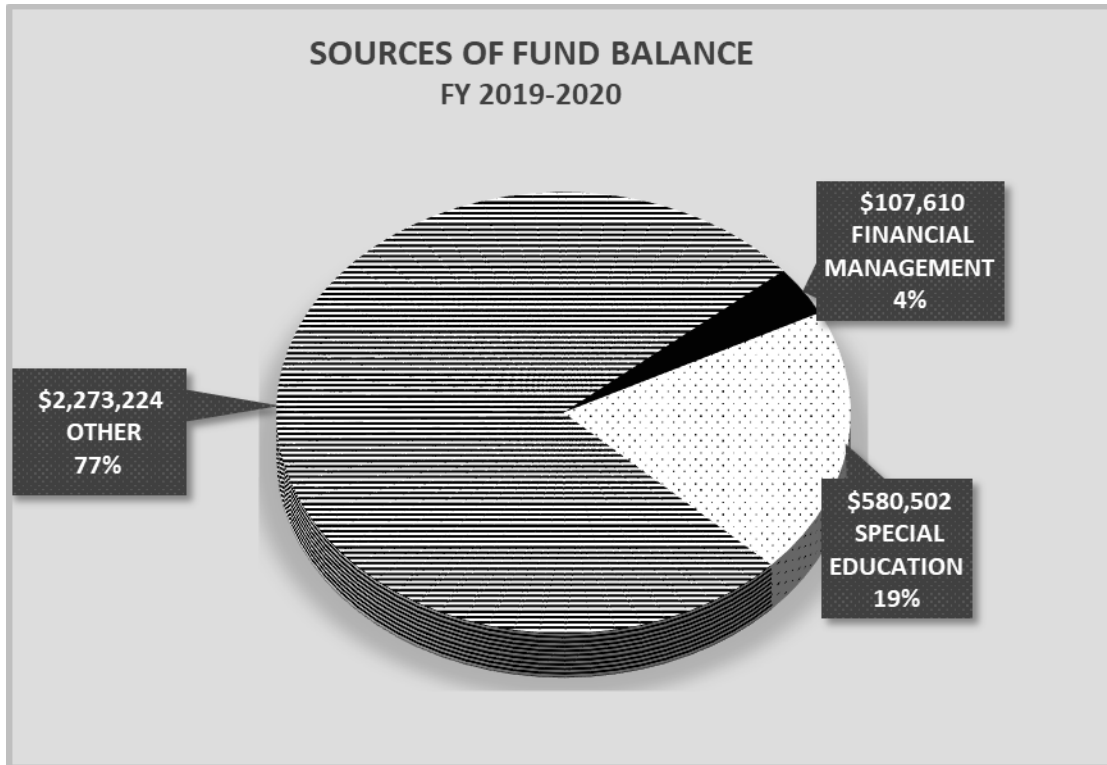
\$93,339 UTILITIES (OTHER): A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

\$57,290 STAFF TRAVEL AND CONFERENCES: Staff travel was halted in mid-March with many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accommodations for out of District travel were not needed during the final quarter of the school year.

\$70,483 INSTRUCTIONAL SUPPLIES (OTHER): Purchases and consumption of instructional materials was reduced during the remote instruction period. It was not feasible to use many art supplies, photography film, live specimens, lumber, and culinary supplies in a remote environment.

\$38,170 COMMUNICATIONS: TEL, POST, ETC. (OTHER): Less copy paper, postage, toner and other Xerox supplies were needed during the remote instruction period. The District also received a grant for internet services.

The primary sources of the fund balance are shown graphically below:



The Board of Education approved* uses of the fund balance are, as follows:

1. **\$1,950,777** - Return of unspent fund balance per audit.
2. **\$ 495,482** – Approved for Capital Reserve
3. **\$ 515,077** - End of Year Purchases

\$1,950,777 RETURN OF UNSPENT FUND BALANCE *pending audit*: the annual audit is usually presented to the Amity Finance Committee and Board of Education for acceptance in December or January. Funds are returned to member towns after completion and acceptance of the audit.

\$495,482 (1%) CAPITAL AND NONRECURRING ACCOUNT: The Amity Finance Committee and Board of Education approved moving forward in the process to transfer 1% of the FY20 budget surplus into the Capital and Nonrecurring account.

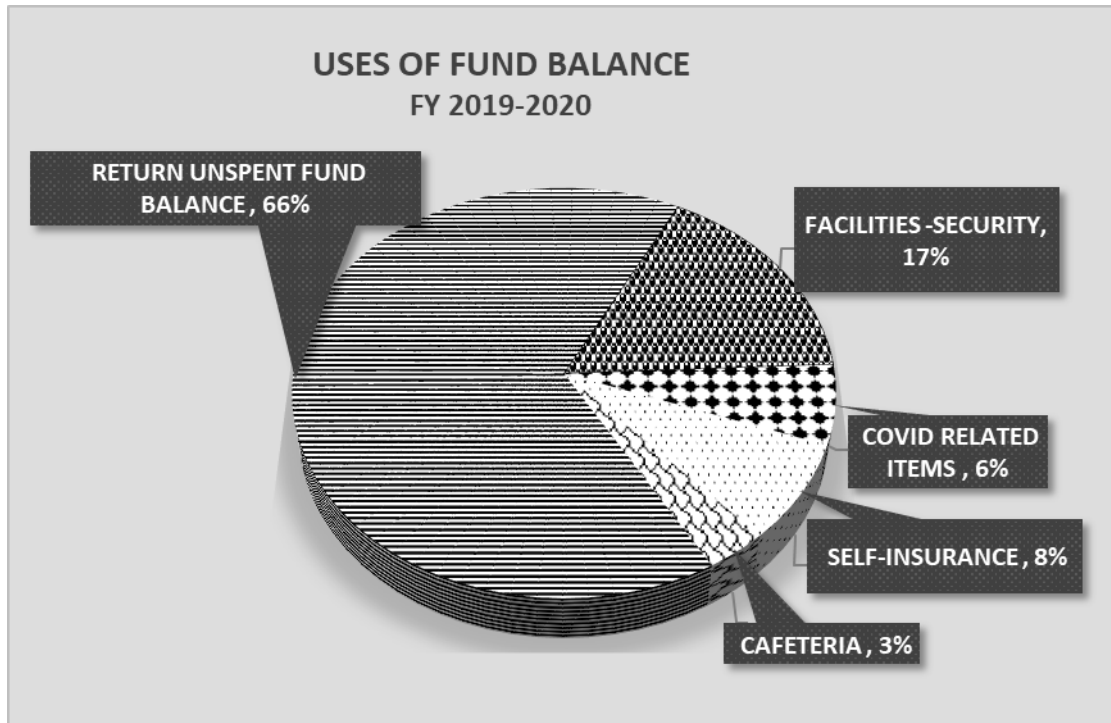
\$515,077 END OF YEAR PURCHASES (EOY):

\$229,311 SELF-INSURANCE FUNDING. (EOY): The suspension of routine exams, diagnostic tests, dental appointments, and non-emergency surgeries reduced the medical claims for the final quarter of FY20. It is anticipated that once the State reopens the missed procedures will be scheduled, as well as those of age and need for the current year, and in a worse case scenario claims could rise due to COVID-19 treatments as the District reopens. This amount represents raising the self-insurance reserve from a 25% threshold of claims to 30% on a temporary basis of one year. If funds are not needed, the reserve will be reduced to 25% and the funds will be utilized to offset the budget request for fiscal year 2021-22.

\$185,766 COVID-19 (EOY): Purchases of personal protective equipment such as masks, gowns, gloves, and face shields were made to prepare for reopening, recognizing none of these items were anticipated in developing the FY21 budget. Thermal security cameras were purchased to register temperatures and perform a mask check of staff and students arriving at main entrances of all three schools. Laptops for high school teachers were purchased to prepare for remote instruction upon reopening.

\$100,000 CAFETERIA (EOY): The District’s fund to support school lunch program has been running a deficit for three straight years. The ongoing repair and maintenance of aging equipment contributed to the deficit and the State’s change in eligibility status determination increased free and reduced lunch status. Next year appears to be even more challenging in the COVID-19 environment as we will have to change how service is provided, food is served, and food packaging. These necessary changes will increase costs with no anticipated increase in revenue.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:

The audited unspent fund balance will be returned to the Member Towns, as follows:

Bethany	\$ 358,085
Orange	\$ 992,321
Woodbridge	\$ 600,371
Total	\$1,950,777

APPENDIX D

RECAP OF 2020-2021

Return Unspent Fund Balance:

The cancellation of 2019-2020 encumbrances of \$352,364 will be returned to the Member Towns. We encumber funds for goods and services received by June 30th but not yet billed. The final quarter of FY20 was a period of shut down making it difficult to determine the need for open orders and there was a substantial amount of unemployment claims in dispute. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance. Once the audit is final for 2020-21, the funds will be returned.

<i>Bethany</i>	<i>\$ 64,680</i>
<i>Orange</i>	<i>\$179,241</i>
<i>Woodbridge</i>	<i><u>\$108,444</u></i>
<i>Total</i>	<i>\$352,364</i>

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$187,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 approved for capital nonrecurring account. These source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 578,763

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$128,708. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440, \$49,245 Pegpetia Grant for course equipment and supplies, \$28,339 for polycarbonate dividers manufactured in-house. \$968,619 was withheld in general fund accounts in preparation for operating in a pandemic environment. These funds were redistributed as needed and it was difficult to predict all throughout the year how much funds would be needed to keep schools open. The District operating under many scenarios, remote, hybrid, shortened days and full days. All operations were subject to constant change during the year making forecasting difficult.

\$194,873 SALARIES (FINANCIAL MANAGEMENT): The administration worked closely with bargaining units to develop options for remote work to keep all staff employed. The administration hired an additional number of bench subs including college students (allowed under executive order) to maintain our own pool of substitutes rather than contracting for more outside services.

\$255,182 GRANTS AWARDS (FINANCIAL MANAGEMENT): The administration closely tracked expenses related to the pandemic and applied for funding under various grants. \$255,182 of expenses were credited to the general operation and charged to appropriate grants.

SPECIAL EDUCATION:

\$1, 078,971

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from

Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Transportation budget was \$488,891 FAV and the tuition budget was \$240,380 FAV.

\$349,700 REVENUE (SPECIAL EDUCATION): The Special Education Grant was higher than budgeted by \$349,700 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$31,662 less than budgeted as interest rates were less than budgeted. Building rental and athletics events generated no income due to COVID-19 pandemic and offset the gain in special education revenue.

OTHER:

\$ 1,858,818

\$1,315,946 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were significantly lower than budgeted, \$1,125,718, amounting to only 75.8% of expected claims. The assumption is members were still hesitant to get routine care because of the pandemic. There were some other savings with other components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

\$212,213 TRANSPORTATION (OTHER): Transportation costs including fuel were reduced since no late busses were offered during the year, fewer athletic trips and no field trips requiring bus services were scheduled due to the pandemic.

\$192,377 SUPPLIES: Instructional supplies and maintenance supplies were underbudget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

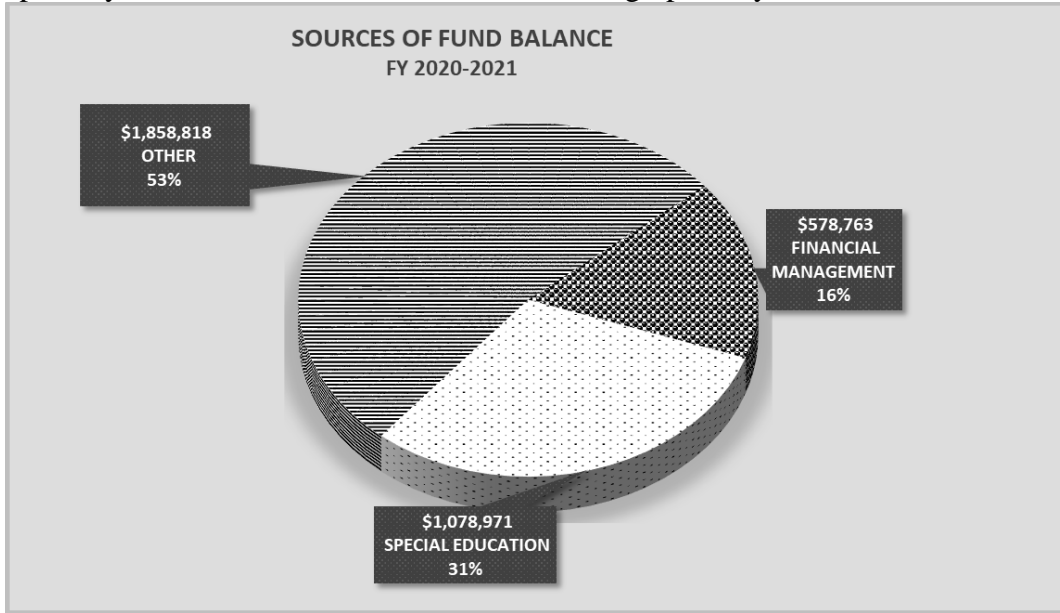
\$111,272 UTILITIES (OTHER): The buildings did not operate under full capacity for most of the year and there were no building rentals, limited evening activities and many more outside events.

\$102,300 PROFESSIONAL TECHNICAL SERVICES (OTHER): Athletic services were reduced for officials and game day workers and special education services were less than budgeted. These savings were offset by higher legal costs.

\$96,312 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Staff travel was not necessary with remote options and many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accommodations for out of District travel were not needed during the school year. Less entry fees for athletics also reduced fees.

Some of these savings were offset by COVID purchases.

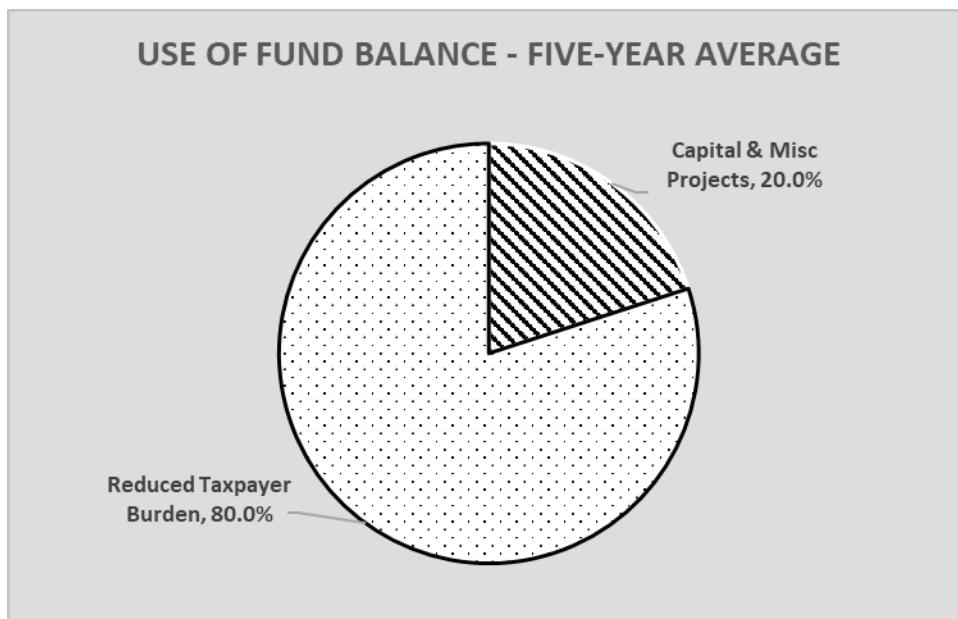
The primary sources of the fund balance are shown graphically below:



The use of the fund balance was designated as follows:

1. **\$187,600** was designated in items removed from the 21-22 budget
2. **\$339,360** was designated for security and technology items eligible for grant reimbursement.
3. **\$507,844** approved for capital nonrecurring projects to offset future budgets.
4. **\$2,483,748** - Return of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:

The audited unspent fund balance would be returned to the Member Towns, as follows:

<i>Town of Bethany</i>	<i>\$ 449,260</i>
<i>Town of Orange</i>	<i>\$1,248,034</i>
<i>Town of Woodbridge</i>	<i><u>\$ 786,454</u></i>
<i>Total</i>	<i>\$2,483,748</i>

APPENDIX E

RECAP OF 2021-2022

Unspent Encumbrances Balance:

The cancellation of 2020-2021 encumbrances of \$83,471 was subtracted from the Towns' March 2023 allocation payment. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2021-2022 is \$628,463 plus \$929,175 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 363,859

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$25,376. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$17,376. \$8,000 of maintenance work done by in-house staff rather than hiring contractors. The District saved \$132,839 on insurances by bidding contracts, utilizing self-insurance funding rather than fully insured, switching to a 401(a) retirement plan, and fully funding OPEB. The District was not fully staffed the entire year and the many vacancies resulted in a surplus, \$205,644. A portion of these funds were transferred to cover outside consultants to cover services, a portion of the funds were utilized in hiring more bench (internal) subs rather than using an outside agency, and some funds remained unspent.

SPECIAL EDUCATION (NET)

\$ 883,882

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. A new program was established in FY22 for the middle school and its counterpart is budget for the high school in the FY23 school year. The Districts revenue derived from these changes in special education services decreased by \$182,187 which is not reflected above.

OTHER:

\$ 309,897

\$138,547 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime,

temporary staff, and outside agencies. Some positions went unfilled for a period of time despite our recruitment efforts. The District was not fully staffed at any point during the school year. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions.

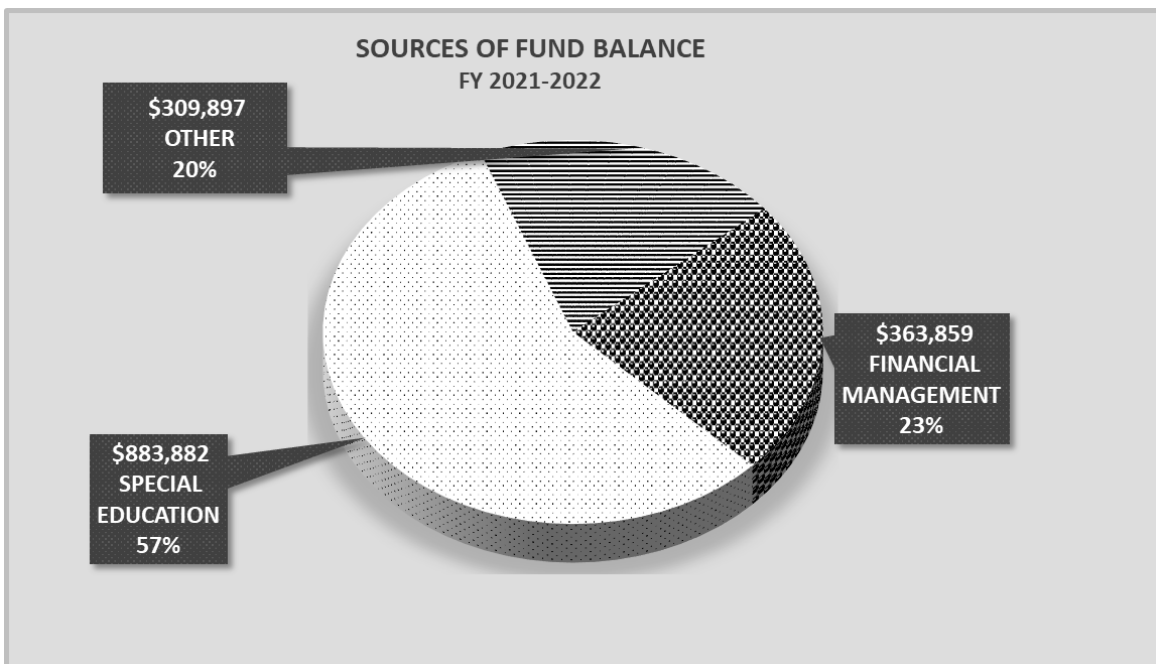
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$57,082 SUPPLIES (OTHER): Instructional supplies and transportation fuel were underbudget. Purchases for consumables was less than budgeted. Repairs and maintenance were overbudget but offset by utilities and maintenance supplies which were underbudget. These areas were reviewed during the 2022-2023 budget process and will be reviewed again during the upcoming budget process.

\$40,537 RENTALS (OTHER): Athletic rentals were down \$12,500 due to lower rentals of other facilities for teams to practice on all weather fields. Special education rental of lease space was \$28,000 lower than anticipated as the University of New Haven provided space gratis and Albertus Magnus did not have a second classroom available.

\$52,080 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Many conferences are held virtually as well as some in-district meetings. This results in lower registration fees and travel costs. Several students were award scholarships to attend conferences and contests offsetting the entrance fees..

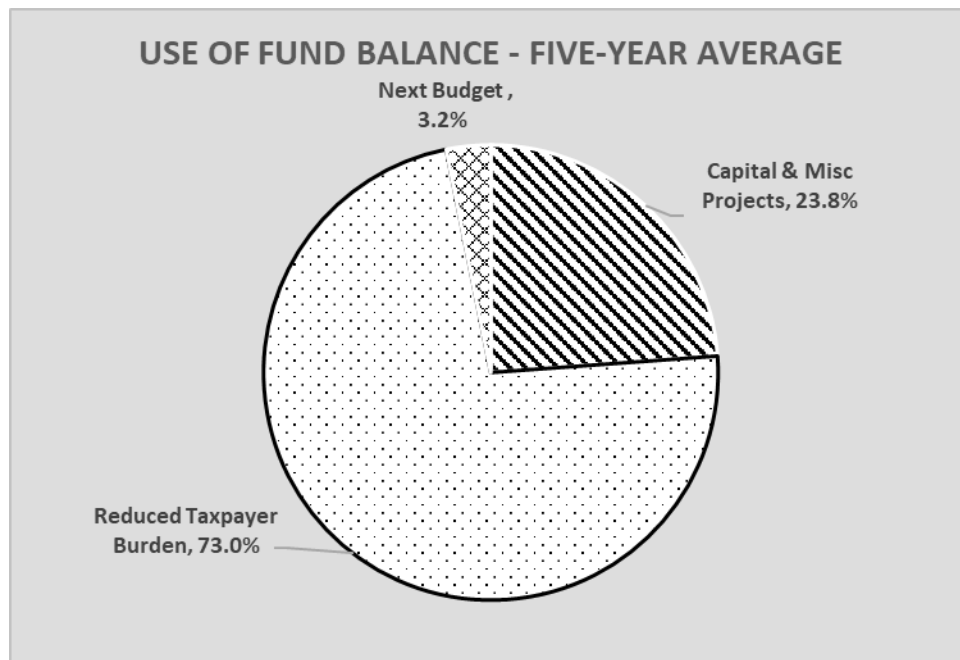
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$929,175 - 1.80%** designated to Capital Nonrecurring Reserve
2. **\$628,463** – Reduced Towns’ allocation payments in March 2023.

The uses of the fund balance are shown graphically below:



Carry Over Funds:

The Board of Education approved 1.80% or \$929,175 of the FY22 surplus transferred to the Capital Nonrecurring Reserve, the audited balance is \$628,463. The FY21 unspent encumbrances and unspent funds from FY22 will be subtracted from the Towns’ March 2023 allocation payments.

Amity Regional School District No. 5 - Budget Transfers 2022-2023

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
NO FUND- 1 ENTRIES				
AUGUST				
NO FUND- 1 ENTRIES				
SEPTEMBER				
Sep-22	17	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (2,850.00)	guards supplies
Sep-22	17	05-14-2600-5730 EQUIPMENT - NEW	\$ 2,850.00	guards supplies
Sep-22	43	05-14-2660-5730 EQUIPMENT - NEW	\$ 2,850.00	Corr. JE 2023-03-17 Guard Supp
Sep-22	43	05-14-2600-5730 EQUIPMENT - NEW	\$ (2,850.00)	Corr. JE 2023-03-17 Guard Supp
Sep-22	102	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (142.00)	CLC Membership Dues
Sep-22	102	02-13-2220-5810 DUES & FEES	\$ 142.00	CLC Membership Dues
Sep-22	104	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (142.00)	CLC Membership Dues
Sep-22	104	01-13-2220-5810 DUES & FEES	\$ 142.00	CLC Membership Dues
Sep-22	120	02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,580.00)	LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	120	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 1,580.00	LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	134	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (500.00)	Concert Supplies
Sep-22	134	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 500.00	Concert Supplies
Sep-22	150	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (600.00)	books for kindles/read wrkshop
Sep-22	150	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 600.00	books for kindles/read wrkshop
Sep-22	157	03-11-1017-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (179.00)	for standing desk
Sep-22	157	03-11-1017-5611 INSTRUCTIONAL SUPPLIES	\$ 179.00	for standing desk
OCTOBER				
Oct-22	22	01-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,580.00)	Renew Gizmos Science License
Oct-22	22	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 1,580.00	Renew Gizmos Science License
Oct-22	39	02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (350.00)	DELTAMATH PLUS LICENSE
Oct-22	39	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 350.00	DELTAMATH PLUS LICENSE
Oct-22	41	01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (2.00)	ITEM PRICE INCREASE
Oct-22	41	01-11-1009-5810 DUES & FEES	\$ 2.00	ITEM PRICE INCREASE
Oct-22	69	03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (345.00)	EAGLE LEASING TRAILER INCREASE
Oct-22	69	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 345.00	EAGLE LEASING TRAILER INCREASE
Oct-22	73	01-11-1005-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (610.00)	Purchase English Dept Supplies
Oct-22	73	01-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 610.00	Purchase English Dept Supplies
Oct-22	74	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ (50.00)	CTE Conference Membership
Oct-22	74	01-11-1008-5810 DUES & FEES	\$ 50.00	CTE Conference Membership
Oct-22	80	04-12-6110-5510 PUPIL TRANSPORTATION	\$ (907.00)	Transportation for Platt Tech
Oct-22	80	05-14-2700-5512 VO-AG/VO-TECH REG ED	\$ 907.00	Transportation for Platt Tech
Oct-22	130	02-11-1008-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (50.00)	CONFERENCE
Oct-22	130	02-11-1008-5810 DUES & FEES	\$ 50.00	CONFERENCE
Oct-22	135	04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (900.00)	REIMBURSEMENT ZOOM
Oct-22	135	04-13-2190-5690 OTHER SUPPLIES	\$ 900.00	REIMBURSEMENT ZOOM
Oct-22	157	05-13-2212-5810 DUES & FEES	\$ (21.00)	11/8/22 Prof Dev Day Lunch
Oct-22	157	05-13-2212-5590 OTHER PURCHASED SERVICES	\$ 21.00	11/8/22 Prof Dev Day Lunch
Oct-22	184	04-12-6130-5510 PUPIL TRANSPORTATION	\$ (1,812.00)	TUITION FOR ECA
Oct-22	184	04-12-6117-5560 TUITION EXPENSE	\$ 1,812.00	TUITION FOR ECA
NOVEMBER				
Nov-22	73	02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (100.00)	FOR REPAIRS TO LAMINATOR
Nov-22	73	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 100.00	FOR REPAIRS TO LAMINATOR
Nov-22	111	03-13-2130-5690 OTHER SUPPLIES	\$ (567.00)	TRANSFER FOR PSNI
Nov-22	111	03-13-2130-5695 TECHNOLOGY SUPPLIES	\$ 567.00	TRANSFER FOR PSNI
DECEMBER				
Dec-22	56	02-13-2220-5690 OTHER SUPPLIES	\$ (800.00)	Books for media center
Dec-22	56	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 800.00	Books for media center
Dec-22	60	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ (720.00)	LIFE ARTS SOFTWARE PURCHASE
Dec-22	60	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 720.00	LIFE ARTS SOFTWARE PURCHASE
Dec-22	81	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (1,233.00)	PROMETHEAN BOARD SHIPPING
Dec-22	81	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 1,233.00	PROMETHEAN BOARD SHIPPING
Dec-22	84	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (1,460.00)	COVER S/H
Dec-22	84	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 1,460.00	COVER S/H
Dec-22	111	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (5.00)	cover s/h
Dec-22	111	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 5.00	cover s/h
Dec-23	113	05-13-2213-5111 CERTIFIED SALARIES	\$ (1,000.00)	PD Supplies
Dec-23	113	05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 1,000.00	PD Supplies

Amity Regional School District No. 5 - Budget Transfers 2022-2023

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JANUARY				
Jan-23	2	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (155.00)	Amer. Library Assoc. Dues
Jan-23	2	02-13-2220-5810 DUES & FEES	\$ 155.00	Amer. Library Assoc. Dues
Jan-23	51	01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (327.00)	SS Music Assembly, Jan. 20
Jan-23	51	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 327.00	SS Music Assembly, Jan. 20
Jan-23	69	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (975.00)	SOCIAL STUDIES PRESENTERS
Jan-23	69	01-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 975.00	SOCIAL STUDIES PRESENTERS
Jan-23	83	04-12-6130-5560 TUITION EXPENSE	\$ (2,900.00)	Outside Prvdrs for IEP Servcs
Jan-23	83	04-13-2130-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 2,900.00	Outside Prvdrs for IEP Servcs
Jan-23	347	04-12-1207-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (750.00)	Supplies for Classroom Sp.Prep
Jan-23	347	04-12-1207-5611 INSTRUCTIONAL SUPPLIES	\$ 750.00	Supplies for Classroom Sp.Prep
Jan-23	348	04-13-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (2,500.00)	Conference Reimbursement
Jan-23	348	04-13-2190-5581 TRAVEL - CONFERENCES	\$ 2,500.00	Conference Reimbursement
Jan-23	393	03-11-1006-5641 TEXTBOOKS	\$ (1,000.00)	TRANSER FOR SUPPLIES
Jan-23	393	03-11-1006-5690 OTHER SUPPLIES	\$ 1,000.00	TRANSER FOR SUPPLIES
FEBRUARY				
Feb-23	8	02-13-2400-5690 OTHER SUPPLIES	\$ (25.00)	REPAIR OF LOCKDOWN SYSTEM
Feb-23	8	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 25.00	REPAIR OF LOCKDOWN SYSTEM
Feb-23	37	03-11-1001-5581 TRAVEL - CONFERENCES	\$ (500.00)	cameras needed for classes
Feb-23	37	03-11-1001-5730 EQUIPMENT - NEW	\$ 500.00	cameras needed for classes
Feb-23	58	02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (969.00)	2 additional window covers
Feb-23	58	05-14-2660-5690 OTHER SUPPLIES	\$ 969.00	2 additional window covers
Feb-23	93	03-11-1008-5810 DUES & FEES	\$ (510.00)	transf funds for TSA activitie
Feb-23	93	03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 510.00	transf funds for TSA activitie
Feb-23	146	02-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (40.00)	SPEAKER FOR SOCIAL STUDIES
Feb-23	146	02-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 40.00	SPEAKER FOR SOCIAL STUDIES
Feb-23	173	03-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (63.00)	Teacher chairs
Feb-23	173	03-11-1006-5690 OTHER SUPPLIES	\$ 63.00	Teacher chairs
Feb-23	177	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (103.00)	Replace color poster printer
Feb-23	177	02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (24.00)	Replace color poster printer
Feb-23	177	02-13-2220-5690 OTHER SUPPLIES	\$ (469.00)	Replace color poster printer
Feb-23	177	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (404.00)	Replace color poster printer
Feb-23	177	02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 1,000.00	Replace color poster printer
Feb-23	186	03-13-2220-5690 OTHER SUPPLIES	\$ (588.00)	Transfer to purchase books
Feb-23	186	03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 588.00	Transfer to purchase books
Feb-23	207	02-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ (500.00)	REPAIRS IN WEIGHT ROOM
Feb-23	207	02-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 500.00	REPAIRS IN WEIGHT ROOM
Feb-23	214	01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (84.00)	INFOSHRED INCREASE NEEDED -PO
Feb-23	214	01-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 84.00	INFOSHRED INCREASE NEEDED -PO
MARCH				
Mar-23	26	04-12-1203-5611 INSTRUCTIONAL SUPPLIES	\$ (517.00)	SAILS Program Other Supplies
Mar-23	26	04-12-1203-5690 OTHER SUPPLIES	\$ 517.00	SAILS Program Other Supplies
Mar-23	28	02-13-2400-5590 OTHER PURCHASED SERVICES	\$ (188.00)	REPAIR TO 911 RADIO SYSTEM
Mar-23	28	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 188.00	REPAIR TO 911 RADIO SYSTEM
Mar-23	43	03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (1,692.00)	United Rental (LIFT)
Mar-23	43	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 1,692.00	United Rental (LIFT)
Mar-23	45	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (345.00)	OnLine AudioRecording Software
Mar-23	45	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 345.00	OnLine AudioRecording Software
Mar-23	49	01-11-1010-5690 OTHER SUPPLIES	\$ (799.00)	Replace out of date amplifier
Mar-23	49	01-11-1010-5731 EQUIPMENT - REPLACEMENT	\$ 799.00	Replace out of date amplifier
Mar-23	87	03-13-2400-5590 OTHER PURCHASED SERVICES	\$ 8,000.00	Academic Decathlon Champion
Mar-23	87	03-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (8,000.00)	Academic Decathlon Champion
Mar-23	105	1 -03-11-1001-5730 EQUIPMENT - NEW	\$ (132.06)	photo consumables
Mar-23	105	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 132.06	photo consumables
Mar-23	106	1 -03-11-1001-5810 DUES & FEES	\$ (80.00)	glazes for ceramics
Mar-23	106	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 80.00	glazes for ceramics
Mar-23	114	1 -01-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (1,000.00)	Frisbee Golf and other supplie
Mar-23	114	1 -01-11-1011-5810 DUES & FEES	\$ (115.00)	Frisbee Golf and other supplie
Mar-23	114	1 -01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 1,115.00	Frisbee Golf and other supplie
Mar-23	147	1 -03-11-1001-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (289.87)	ink digital lab printers
Mar-23	147	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 289.87	ink digital lab printers
Mar-23	152	1 -02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (1,270.00)	REPLACING POSTER PRINTER
Mar-23	152	1 -02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 1,270.00	REPLACING POSTER PRINTER

Amity Regional School District No. 5 - Budget Transfers 2022-2023

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
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AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



Theresa Lumas
Director of Finance and Administration
terry.lumas@amityregion5.org

Phone (203) 397-4813
Fax (203) 397-4864

To: Jennifer Byars, Ed. D., Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Budget Transfers over \$3,000
Date: March 21, 2023

Special Education:

1. Professional Development

This budget transfers request is for staff attending professional conferences outside of the State of Connecticut which provides high quality professional development in the areas of social/emotional learning, mental health, administration, and comprehensive special education programming and planning.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve...

...the following budget transfer for special education professional development

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-13-2190-5330	Professional Tech Svcs	\$6,200	
04-13-2190-5581	Travel-Conferences		\$6,200

Facilities:

1. Auto Lift

This budget transfer request is to replace one of two auto lifts in the auto shop. The lift is failing and is a safety issue. The lift has been serviced and cannot be repaired.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve...

...the following budget transfer for an auto lift

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5613	Custodial Supplies	\$2,353	
02-14-2600-5613	Custodial Supplies	\$2,353	
03-14-2600-5613	Custodial Supplies	\$2,353	
03-14-2600-5731	Equipment – Replacement		\$7,059

Technology:

This budget transfer request is to consolidate all the technology account into the district wide account to prioritize purchases for the rest of the year. Purchases will include upgrades to hard drives, additional memory, and computers cut from the budget for an art lab at the high school.

Motions:

For the Amity Finance Committee: *Recommend the Amity Board of Education approve...*

For the Amity Board of Education: *Move to approve...*

...the following budget transfer for an technology purchases

ACCOUNT	ACCOUNT DESCRIPTION	FROM	TO
01-14-2350-5695	TECHNOLOGY SUPPLIES	2,714.62	
02-14-2350-5695	TECHNOLOGY SUPPLIES	2,765.73	
03-11-1005-5695	TECHNOLOGY SUPPLIES	31.43	
03-11-1006-5695	TECHNOLOGY SUPPLIES	1,272.90	
03-13-2130-5695	TECHNOLOGY SUPPLIES	142.00	
03-13-2400-5695	TECHNOLOGY SUPPLIES	270.01	
04-12-2350-5695	TECHNOLOGY SUPPLIES	1,978.00	
05-14-2350-5695	TECHNOLOGY SUPPLIES		9,174.69
01-14-2350-5732	EQUIPMENT-TECHNOLOGY-NEW	476.54	
02-14-2350-5732	EQUIPMENT-TECHNOLOGY-NEW	485.54	
03-11-1001-5732	EQUIPMENT-TECHNOLOGY-NEW	8,912.10	
03-11-1006-5732	EQUIPMENT-TECHNOLOGY-NEW	180.00	
03-11-1014-5732	EQUIPMENT-TECHNOLOGY-NEW	195.33	
05-14-2350-5732	EQUIPMENT-TECHNOLOGY-NEW		10,249.51

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



Theresa Lumas
Director of Finance and Administration
terry.lumas@amityregion5.org

Phone (203) 397-4813
Fax (203) 397-4864

To: Jennifer Byars, Ed. D., Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Capital Projects FY 2022-23 Change Order

Date: March 21, 2023

Track Surfacing -Jumping Pits:

Last summer the track had an additional surface coat installed to improve the conditions. The three jumping pits were not done at that time. We asked FieldTurf to have an additional surface coat installed on the three pits. Two of the three pits surfaces required an additional coat due to the water ponding or wear of the surface. We agreed to pay for the cost of the third pit to keep consistent layers across all track surfaces. There are still funds on the field line to cover the costs so no transfer is needed. The cost is \$25,000 to District.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve

\$25,000 for the additional coat applied to the jumping pits at the stadium.

Instruction

Controversial Topics

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes the intelligent discussion of vital current public topics leads to the development of an inspiring school culture of understanding and inclusion and prepares students for citizenship. Discussing controversial topics helps students with different backgrounds to learn to live and work together peacefully and respectfully. It encourages them to listen to each other and talk through their differences sensitively. It also challenges them to think critically about their own beliefs and values and gives them confidence and skills to express these publicly.

The Board holds that one of the fundamental purposes of education is to teach students how to think critically, evaluate, and take a position when confronted with alternative choices. Therefore, schools have an obligation to allow students a forum for examination and discussion of controversial topics which arise in connection with the instructional program. A topic shall be considered controversial if it is socially unresolved, generates highly divergent opinions, and may be considered an unsuitable curriculum topic by some members of the community.

The Board recognizes the role of public education in preparing students for effective citizenship. Consequently, the instructional program to achieve this purpose must appropriately address the responsibilities of living in a pluralistic society. The Board supports the examination of controversial topics related to the Board-approved curriculum in an impartial and objective manner. Controversial topics in the classroom shall be handled as a regular aspect of instruction and learning in such a way as to support the dignity, the personality, and the intellectual integrity of teachers and students. The examination of controversial topics shall occur in inclusive and supportive learning environments that encourage respect for multiple perspectives.

The historic principle of academic freedom grants and protects the teacher's right to raise and reasonably treat controversial topics in the carrying out of approved school system curricular policies. It is the duty of the educational community to model for our students the consideration of diverse ideas and respect for civil discourse. It is incumbent upon educators to establish an emotionally safe environment for students to explore new ideas. Teachers are responsible for instruction in varied perspectives; engaging students in critical thinking; and facilitating students' discovery of their own ideals and thoughts, all while modeling respectful dialogue and authentic inquiry.

ARSD teachers, as beneficiaries of the legal rights established in the historic principle of academic freedom, have the right to teach students in ways that best utilize their professional knowledge, academic interests, and competencies. Teachers must be keenly aware of their position of influence and that the classroom is not a forum to promote a particular political vantage point. No statute or court decision has approved of teacher actions or statements that substantially interfere with the reasonable requirements of school discipline or established curriculum. The guarantees of free speech or the doctrine of academic freedom have never been recognized by the courts as vehicles to allow teachers to violate an established and reasonably well-defined curriculum or to create or modify curriculum programs according to his/her beliefs.

Instruction

Controversial Topics

ARSD students have the right to discuss controversial topics as an essential part of their education. To these ends the Board recognizes the place of controversial topics in the educational experience of its students, provided that such topics are studied under competent instruction in an atmosphere free from bias and prejudice; that they are relevant to the course of study in which they are studied; that they are appropriate learning objectives for the academic level and maturity of the students; and that the topic in question is taught objectively, equitably, and as accurately as possible.

Legal Reference: Connecticut General Statutes
31-51q Liability of employer for discipline or discharge of employee on account of employee's exercise of certain constitutional rights.

Keyishian v. Board of Regents 395 U.S. 589, 603 (1967)

Garcetti v. Ceballos, (2006) 547 U.S. 410

Johnson v. Poway Unified School District, (2011) 658 F.3d 954 (9th Cir.)

Mayer v. Monroe County Community School Corporation, (2007) 474 F.3d 477 (7th Cir.)

Academic Freedom Policy (adopted by Connecticut State Board of Education, 9/9/81)

Instruction

Controversial Topics

I. Responsibility for Instruction on Controversial Topics

- A. ARSD has a responsibility to include, in various curriculum areas and at all grade levels, content dealing with sensitive topics and materials, some of which will be controversial.
- B. Development of analytical thinking and preparation for citizenship are the primary reasons for including the study of controversial topics or use of controversial materials in the curriculum.
- C. ARSD, as an educational institution, has a responsibility to give the student:
 - 1. An opportunity to study controversial topics or read controversial materials which have political, economic, or social significance about which they will begin to develop a viewpoint.
 - 2. Access to all relevant information, including the materials that circulate freely in the community.
 - 3. Competent instruction balancing the various points-of-view in an atmosphere free from bias and prejudice.
 - 4. The right to form and express their own thinking on controversial topics or materials without jeopardizing their relations with teachers, peers, or the school.
 - 5. Deliberate effort by the teacher to achieve balance over time in the viewpoints to which students are exposed.

II. Guidelines for the Selection of Controversial Topics

- A. Topics of classroom discussion should, first and foremost, always be driven by ARSD curriculum.
- B. The topic or material should contribute toward helping students develop techniques for examining other controversial topics or materials.
- C. The topic or material should be suitable for students of the maturity and background represented in the respective class.
- D. The topic or material should be related to the standards and course content and help achieve those standards and course objectives.
- E. The topic or material should be of continuing significance to society.
- F. Students shall be assured of their right to form and express an opinion without jeopardizing their grades or being subject to discrimination, retaliation, or discipline, provided the viewpoint does not constitute harassment, threats, intimidation, or bullying or is otherwise unlawful.
- G. The instruction shall not reflect adversely upon persons because of their race, ethnicity, national origin, sex, sexual orientation, gender identity or expression, disability, religion, or any other basis prohibited by law.
- H. The subject matter of the instruction shall not otherwise be prohibited by state or federal law.

Instruction

Controversial Topics

III. Inclusion of Controversial Topics in the Curriculum

Controversial topics may be introduced into the curriculum for one or more of the following expected student outcomes:

- A. Learning to analyze current political, economic and social problems of major concern.
- B. Learning to differentiate fact from opinion and/or propaganda.
- C. Learning to identify and analyze prejudice.
- D. Learning to form and express personal opinions in a courteous, respectful manner without jeopardizing peer, teacher, or school relationships.
- E. Learning respect for the concept of majority and minority opinion and the resulting impact on the societal process.
- F. Learning to draw intelligent conclusions from facts, which may serve as a basis for forming personal opinions.

IV. Limited Opportunities for Parental Opt-Out

Connecticut state law provides limited opportunities for parents/guardians to opt their student(s) out of participation in a school's program of instruction /curriculum.

C.G.S. 10- 16e, allows students with written parental notification to the school to opt out of family life education programs which may be offered by a public school.

C.G.S. 17a-101q allows students with written parental notification to opt out of the sexual abuse prevention and awareness program or any part of it.

C.G.S. 10-18c allows students with written parental notification to opt out of all or part of a firearms safety program if offered by a public school.

C.G.S. 10-18d allows students with written parental notification to opt out of any dissection activities.

C.G.S. 10-19c allows students with written parental notification to the school to opt out of planned, ongoing and systematic instruction of Acquired Immune Deficiency Syndrome (AIDS).

A parent should notify the school principal in writing their decision to opt their child out of instruction in one of the four topics listed above. Opt-out notification must be provided on an annual basis. Exempt students will be provided with an opportunity for study or schoolwork when the student would otherwise be participating in the program they have been opted out of.

Instruction**Controversial Topics****V. Academic Freedom**

- A. Teachers and administrators shall have the right to determine and select which instructional material and methods are to be used in the schools, subject to budgetary consideration and Board policy.
- B. Partisan views of teachers, administrators, the public, and/or Board members may not be used to suppress (or promote) instructional materials that are otherwise appropriate (or inappropriate).
- C. Teachers' personal opinions may be presented provided that the teacher does not use them to indoctrinate students. Teachers are expected to label their opinion as such when it is expressed as a personal point of view.
- D. Teachers shall not penalize students who disagree with them or who present views which are unpopular and/or not widely accepted.

VI. Guest Speakers

When a guest speaker is invited to make a presentation related to a controversial issue, the Superintendent or designee shall notify him/her of this policy and the expectations and goals regarding the instruction. If the guest speaker is presenting only one point of view on an issue, the teacher shall be responsible for ensuring that students also receive information on opposing viewpoints.

Mission-Goals-Objectives

Bias Incidents in Schools

The Amity Regional School District No.5 (District) Board of Education (Board) is committed to providing a safe learning and working environment that is free from discrimination, harassment, intimidation and/or bullying. Hate-motivated and bias incidents are a direct attack upon the school community and will not be tolerated by or within the school district. Hate-motivated incidents or actions motivated by bias/prejudice/bigotry jeopardize both the safety and well-being of all students and staff. District policy requires all schools and personnel to promote mutual respect and understanding among students and staff.

Definitions

A **“bias incident”** is any suspected or confirmed offense which is directed at or occurs to a person, private property, or public property on the basis of race, color, gender, religion, sexual orientation, or ethnicity. An act is bias-based and thus constitutes a bias incident if the motive for the commission of the act is racial, religious, ethnic or pertains to sexual orientation, including gender identity or expression.

A **“hate-motivated incident”** is a noncriminal act or attempted act that constitutes an expression of hostility, bias, or bigotry against a person, property, or institution because of the target’s actual or perceived protected characteristics as set forth above. This may include using insults, taunts and slurs, distributing or posting hate group literature or posters, defacing, removing, or destroying posted materials or announcements, posting or circulating demeaning jokes or leaflets, or sending insulting or threatening messages by phone, e-mail, websites or any other electronic or written communication.

“Retaliation” is any form of intimidation, reprisal, or harassment by a student directed against any student, staff or other individual for reporting or filing a complaint, for aiding or encouraging the filing of a report or complaint, for cooperating in an investigation under this policy, or for taking action consistent with this policy. Interference with, intimidation of, and/or retaliation against any individual, including a student, parent, or guardian, for filing a complaint, filing a grievance, or opposition discrimination is strictly prohibited and shall be treated as an actionable, wrongful act in and of itself.

Hate Prevention Program

Training shall be provided to all district staff inclusive of anti-bias and conflict resolution methods; procedures for identifying and reporting incidents of racial, religious, and sexual harassment and discrimination; strategies for preventing such incidents from occurring; and resources available to assist in dealing with these incidents.

All students shall receive hate prevention instruction through age-appropriate classroom activities, assemblies, and school-related activities. Structured classroom activities and programs will help students to develop empathy, while practicing the critical thinking and conflict resolution skills needed to recognize and respond to various manifestations of hate-motivated and bias-related behavior.

Policy adopted:

Amity Regional School District No. 5
Woodbridge, Connecticut

Mission-Goals-Objectives

Bias Incidents in Schools

The District will develop partnerships with families, community organizations, and law enforcement agencies. These partnerships help identify resources available to school personnel to address hate and bias incidents, raise community awareness of the issue, ensure appropriate responses to hate and bias incidents, and ensure that youth receive a consistent message that hate-motivated and/or bias-related behavior will not be tolerated.

A range of corrective actions for those who violate school hate-prevention policies shall be used. A substantiated charge of discrimination or harassment on the part of a student shall subject that student to disciplinary action, which may include suspension or expulsion, consistent with the Board policy on Student Conduct. School officials shall contact local, state or federal civil rights officials to respond to more serious incidents and, in cases involving suspected criminal activity or threat of criminal activity, shall call the police.

Required Actions

Whenever any school employee in the course of his/her employment has reason to believe that a hate-motivated or bias incident has been committed or is about to be committed on school property or has been or is about to be committed by any student, whether on or off school property, the school employee should immediately notify the building principal.

Any student who becomes aware or has a reasonable belief that harassment, bullying, discrimination, retaliation, or a hate-motivated or bias incident has occurred or may have occurred on school property or in a school-related activity should promptly report the incident(s) to the Principal or their designee. In situations where a student does not feel comfortable reporting the incident to the Principal or their designee, the student may report it to a trusted school employee, who must promptly transmit the report to the Principal or their designee.

The District will take appropriate steps to protect students from retaliation when they report, file a complaint of, or cooperate in an investigation of a violation of this Policy. Threats or acts of retaliation, whether person-to-person, by electronic means, or through third parties, are serious offenses that will subject the violator to significant disciplinary and other corrective action, including short or long-term suspension, or expulsion.

The Principal or their designee, upon receipt of a viable report of bullying, hate-motivated or bias incident shall promptly contact the parents or guardians of a student who has been the alleged target and the alleged perpetrator of the incident.

In deciding whether to refer the matter of a hate-motivated or bias incident to local law enforcement, the building principal and the Superintendent should consider the nature and seriousness of the conduct and the risk that the conduct posed to the health, safety and well-being of any student, school employee or member of the general public. It is understood a referral to the Police Department is only a request to conduct an investigation and nothing more than the transmittal of information which might be pertinent to any such law enforcement investigation. A referral is not an accusation or formal charge. It is the responsibility of law enforcement to determine if a bias incident constitutes a hate crime.

Policy adopted:

Amity Regional School District No. 5
Woodbridge, Connecticut

Mission-Goals-Objectives

Bias Incidents in Schools

Frivolous Complaints

When a complaint is unfounded, frivolous, or maliciously fabricated, the complainant shall be subject to a range of disciplinary and correction actions consistent with the Board policy on Student Conduct.

- (cf. 0521 – Affirmative Action Plan/Nondiscrimination)
- (cf. 4111.1 – Equal Employment Opportunity)
- (cf. 4118.11 – Nondiscrimination/Equal Employment Opportunity)
- (cf 4118.112/5145.5 – Prohibition Against Sexual Harassment)
- (cf. 4131 – Staff Development)
- (cf 5114.12 – Restorative Practice)
- (cf. 5131 – Student Conduct)
- (cf. 5131.911 – Bullying and Teen Dating Violence)
- (cf. 5145.4 – Nondiscrimination - Transgender and Gender Non-Conforming Students)
- (5145.45 – Nondiscrimination)
- (cf. 6115 – Ceremonies and Observances)
- (cf. 6121 – Nondiscrimination)

Legal Reference: Connecticut General Statutes

10-15c Discrimination in public schools prohibited. School attendance by five-year olds. (Amended by P.A. 97-247 to include “sexual orientation” and P.A. 11-55 to include “gender identity or expression”)

10-153 Discrimination on account of marital status

29-7m(a) Classification of crimes motivated by bias

29-7m(b) Report of crime motivated by bias

46a-60 Discriminatory employment practices prohibited

53a-181i Intimidation based on bigotry or bias: Definitions

17a-101 Protection of children from abuse

Connecticut State Board of Education “Position Statement on Culturally Responsive Education,” adopted May 4, 2011

P.A. 17-111 An Act Concerning Hate Crimes

Title VII, Civil Rights Act, 42 U.S.C. 2000e, et seq.

29 CFR 1604.11, EEOC Guidelines on Sex Discrimination

Policy adopted:

Amity Regional School District No. 5
Woodbridge, Connecticut

Mission-Goals-Objectives

Bias Incidents in Schools

Title IX of the Educational Amendments of 1972, 20 U.S.C. 1681 et seq.
34 CFR Section 106.8(b), OCR Guidelines for Title IX

Definitions, OCR Guidelines on Sexual Harassment, Fed. Reg. Vol 62,
#49, 29 CFR Sec. 1606.8 (a) 62 Fed Reg. 12033 (March 13, 1997) and 66
Fed. Reg. 5512 (January 19, 2001)

20 U.S.C. 7905 (Boy Scouts of America Equal Access Act)

Meritor Savings Bank. FSB v. Vinson, 477 U.S. 57 (1986)

Faragher v. City of Boca Raton, No. 97-282 (U.S. Supreme Court, June
26, 1998)

Gebbs v. Lago Vista Indiana School District, No. 99-1866, (U.S.
Supreme Court, June 26, 1998)

Davis v. Monro County Board of Education, No. 97-843, (U.S. Supreme
Court, May 24, 1999.)

The Vietnam Era Veterans' Readjustment Act of 1974, as amended, 38
U.S.C. §4212

Title II of the Genetic Information Nondiscrimination Act of 2008

The Americans with Disabilities Act as amended by the ADA
Amendments Act of 2008

Public Law 111-256

Meacham v. Knolls Atomic Power Laboratory 128 S.Ct. 2395, 76
U.S.L.W. 4488 (2008)

Federal Express Corporation v. Holowecki 128 S.Ct. 1147, 76 U.S.L.W.
4110 (2008)

Kentucky Retirement Systems v. EEOC 128 S.Ct. 2361, 76 U.S.L.W. 4503
(2008)

Sprint/United Management Co. v. Mendelsohn 128 S.Ct. 1140, 76
U.S.L.W. 4107 (2008)

Policy adopted:

Amity Regional School District No. 5
Woodbridge, Connecticut

Instruction

Selection of Library Media Center Materials and Resources

Library Media Center materials shall be selected relative to the needs, interests, and abilities of the students in the Amity Regional School District No. 5 (ARSD). The school library media specialists shall attempt to stimulate and guide reading and teach the effective use of the library.

To this end, the ARSD Board of Education (Board) affirms that it is the responsibility of its professional staff:

- To provide materials that will enrich and support the curriculum, taking into consideration the varied interests, abilities, learning styles, and maturity levels of the students served;
- To provide materials that will stimulate growth in factual knowledge, literary appreciation, aesthetic values, societal standards, and reading skills;
- To provide materials on various sides of controversial topics so that young citizens may have an opportunity to develop under guidance the practice of critical analysis and to make informed judgments in their daily lives;
- To provide materials representative of the diverse religious, ethnic, cultural, and social groups and individuals that contribute to our world community;
- To place principle above personal opinion and reason above prejudice in the selection of materials, based on their educational and/or socio-cultural value in order to assure a comprehensive collection for the school community.

The primary responsibility for the selection of library media center materials lies with library media specialists employed by the school system. Recommendation of resources may involve many people including but not limited to building principals, district administrators, teachers, students, parents, and community members. The responsibility for coordinating the selection of library media resources and making the recommendation for purchase rests with the professionally trained library media personnel.

The Board subscribes to the Library Bill of Rights (AASL). In evaluating a book or other instructional material, it shall be judged in its entirety and not on isolated pages or parts. Controversial topics shall not in themselves require automatic rejection of the material considered.

The Superintendent shall establish an administrative regulation setting forth the process for responding to complaints, if any, concerning school library media center materials.

In accordance with Section 10-221 of the Connecticut General Statutes, the final decision for controversial reading matter shall rest with the Board of Education. The Board may designate a committee of the board for the purpose of reviewing formal complaints. Such decision shall be made following careful examination and discussion of the book or reading material with school administration and any other parties the Board may wish to include. The Board of Education shall base its decision regarding the works in question on legitimate pedagogical interests.

(cf. 1312 - Public Complaints)

Policy Approved: DATE

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Instruction

Selection of Library Media Center Materials and Resources

(cf. 3260 – Sale & Disposal of Books, Equipment & Supplies)
(cf. 4118.21 - Academic Freedom)
(cf. 6144 – Controversial Issues)
(c.f. 6163 – Instructional Resources for Students)
(c.f. 9132.3 – Curriculum Committee)

Legal References: Connecticut General Statutes

10-220 Duties of boards of education.

10-221(s) Boards of education to prescribe rules, policies, and procedures.

10-228 Free textbooks, supplies, materials and equipment.

10-240 Control of schools.

10-241 Powers of school districts.

Academic Freedom Policy (adopted by Connecticut State Board of Education, 9/9/81)

Office for Intellectual Freedom, American Library Association. (2016).
Selection and Reconsideration Policy Toolkit for Public, School, & Academic Libraries.